Making Governance Work in the Real World

Session 02 of 4 · Execution

October 22, 2026 | Jason Stearns, LexShift, with Chantel Johnson, Bank of China

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GOVERNANCE REIMAGINED

WHERE WE ARE IN THE SERIES

From Foundation to Execution

SESSION 01	SESSION 02	SESSION 03	SESSION 04	OUTCOME
Foundation: retention is infrastructure, not a schedule	Execution: making governance work in the real world	Investment: building the case and funding the roadmap	AI Readiness: governing information in the age of AI	Governed advantage: sustained, defensible, AI-ready

Session 01 reframed retention. Today we make governance work.

Most programs have the policy. Execution is the gap.

The challenge Session 02 takes on

What We'll Explore

The operating framework

- Translating policy into repeatable operational processes
- Clarifying ownership across Legal, IT, Privacy, Security, Records, and the business
- Extending governance beyond repositories of record
- Prioritizing high-value and high-risk information

Putting it to work

- A real implementation story: starting point, challenges, decisions, and results
- Building momentum through practical, measurable wins
- Your 90-day action plan

TODAY'S SPEAKERS

Framework and Field Experience

Jason Stearns FAI, IGP, CRM

- Chief Success Officer, LexShift
- Introduces the operating framework, connects it to the series, and guides the discussion

Chantel Johnson

- Senior Vice President, Chief Data Office, Bank of China
- Shares the starting point, internal challenges, decisions made, and measurable results

PART 1

The Operating Framework

How policy becomes practice across systems, functions, and priorities.

Translate Policy Into Repeatable Process

01

Define the trigger

- The event that starts the process: creation, closure, a legal hold, or a system retirement.

02

Assign the owner

- One accountable role for each step, supported by the functions that enable it.

03

Embed and measure

- Built into the systems where work happens, with evidence that it ran as designed.

Clarify Ownership Across the Functions

Legal and Privacy

- Define obligations, defensibility requirements, and acceptable risk.

IT and Security

- Configure, protect, and operate the systems that hold the information.

Records and Business

- Apply the rules day to day and own the information they create.

Govern Where Information Actually Lives

Repositories of record

- Records systems, ECM, and formal archives
- Usually where governance is strongest

Where work happens

- Email, collaboration platforms, file shares, chat, and SaaS applications
- Where most volume and risk accumulate

Start Where Value and Risk Are Highest

High value, high risk	High risk, low value	High value, low risk	Low value, low risk
▪ Start here. Govern actively and measure closely.	▪ Dispose defensibly and reduce exposure.	▪ Protect access and enable use.	▪ Address through routine disposition.

PART 2 · REAL WORLD PERSPECTIVE

The Implementation Story

What it took to move one program from intent to execution.

From Starting Point to Results

01

Starting point



02

Challenges



03

Decisions



04

Results



What Changed – File Deletion

BEFORE IMPLEMENTION

0 files deleted

Ad hoc (if at all)

RESULT

+10M files / ~6TB

Systematic review and deletion

- Retention Schedule
- Business Group Engagement
- PII and other sensitive information types
- Structured and Unstructured information
- Record and information (non-records)

Build Momentum Through Measurable Wins

Narrow the scope

- One priority executed well beats five started at once.

Define the win early

- Agree up front on the result leadership will recognize.

Show progress early

- Visible results within 90 days build support for the next phase.

What Carries Over to Your Program

- Start with the priority where value and risk are clearest, not the one that is easiest to scope.
- Name owners before selecting tools. Technology supports accountability; it does not create it.
- Accept compromises that move the program forward. Consistency beats perfection.
- Measure what leadership already cares about and report it in their language.

YOU'LL LEAVE WITH

A Practical 90-Day Action Plan

DAYS 1-15	DAYS 16-30	DAYS 31-60	DAYS 61-80	DAY 90
Select one priority with clear value or risk	Name the accountable owner and supporting functions	Design the process and embed it where work happens	Execute, track adoption, and resolve exceptions	Report the measurable win and select the next priority

One priority, executed well, builds the case for the next.

DISCUSSION · 10 TO 15 MINUTES

Open Q&A

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Make Governance Work Where the Work Happens

Next: Session 03

The Governance Investment, November 19

Register for Session 03

https://meet.zoho.com/lhms-ydu-zng

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