

Dickinson Wright Modernizes Records Retention by Ditching the Spreadsheet-Based Schedule



The Challenge

The firm, Dickinson Wright had outgrown the process they used to maintain their records retention schedule. The firm's retention policy included a lengthy Excel-based retention chart as an appendix, which the Records and Information Governance team updated manually once a year.

While functional, the chart easily became outdated between annual updates. It also lacked the supporting legal citations their employees needed to understand the basis for each retention requirement. When questions arose, people often relied on institutional knowledge or differing interpretations, leaving the Information Governance team to conduct manual research and explain retention decisions case by case.

This process consumed valuable time and created uncertainty around when records could be defensibly disposed of. Dickinson Wright needed an authoritative source of retention guidance that stayed current throughout the year and gave employees confidence that decisions were supported by applicable legal and regulatory requirements.

The Solution

To modernize its information governance program, Dickinson Wright selected **Access Unify® | Lifecycle** as the technology solution to host the firm's centralized records retention schedule. The firm now references Access Unify® | Lifecycle directly within its retention policy.

The Excel-based retention chart was replaced with a continuously updated schedule that includes supporting legal citations for every retention requirement. Stakeholders can now see how long a record should be kept and understand the authority behind the decision.

Dickinson Wright also mapped every matter practice code in its legal records system to the corresponding record series, giving the team a direct path from a matter type to the applicable retention requirement. Now they can identify guidance for virtually any matter more efficiently while applying retention requirements consistently across the firm.

The Results

The retention schedule now serves as an active, authoritative resource for Dickinson Wright's information governance program, and it's set the team up for success. With immediate access to defensible guidance supported by legal citations, they've reduced the time required to research and respond to retention questions.

The firm also has greater confidence when determining whether records are eligible for disposition. This has supported office consolidations

About Dickinson Wright

Dickinson Wright is a full-service law firm with more than 500 attorneys practicing across the United States and Canada.

and records cleanup initiatives by giving teams documented requirements they can use to make informed decisions.

A Customer Perspective

An office relocation in El Paso, Texas demonstrated the practical value of this approach. The office accumulated paper records for approximately 40 years, and by using the retention guidance and supporting citations in Access Unify | Lifecycle, they identified which records were eligible for disposition and showed firm leadership the basis for those decisions. That instilled confidence in disposing of unnecessary records before the move.

Kevin Clark, Dickinson Wright's Information Governance leader, summarizes their modernization efforts simply:

"We got rid of the stale chart and are just referencing Access Unify | Lifecycle now."

The supporting legal citations have changed how the firm handles retention questions. Instead of relying on differing opinions, the Information Governance team can point to the authority behind each requirement.

"As a law firm, the citations are helpful because we can say, 'Here's why. Here's what we're using.' You get a lot of opinions, but having the citations behind the schedule helps us."

The clearer guidance is also prompting employees to take a closer look at the records they hold and question whether those records still need to be retained.

"We've had a lot of administrative people call and ask, 'Do we really need to keep all of this?' That's generated a lot of good conversations, and we've had some real success with it."

Dickinson Wright continues to work with Access to further connect records management processes across its information governance program. Looking to the future, it sees Access Unify | Lifecycle as the authoritative source for retention policy across the firm.

About the Company

Access is the largest privately held records and information management services provider worldwide, with operations across the United States, Canada, Central and South America. Access provides transformative services, expertise, and technologies to make organizations more efficient and more compliant. Access helps companies manage and activate their critical business information through offsite storage and information governance services, scanning and digital transformation solutions, document management software, and secure destruction services. Access has been named twelve times to the Inc. 5000, the ranking of fastest-growing private companies in the U.S. All trademarks, service marks and company names are the property of their respective owners.