



PROPOSAL KIT SAMPLE

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File Plan

As part of <<Company>>'s Records Management Program, all documents created from business activities and transactions will be managed and disposed of according to a File Plan. The File Plan will ensure <<Company>>'s records are effectively maintained and compliant with regulatory audits, and will also increase business efficiency and retain the continuity of corporate knowledge.

<< The File Plan is used to provide a foundation for organizing the company's documents and records using a controlled vocabulary or taxonomy for the management of content throughout the document's life cycle. Refer to the Taxonomy template to outline your Records Management Taxonomy. >>

<< A File Plan can be just a few pages listing the recordkeeping requirements of core business records or a detailed map of the organization's classification scheme for the management of all content. Use it to create a basic or expanded records retention schedule which can be customized to meet specific regulatory, jurisdictional, and organizational needs and to describe your organization's outline for managing the life cycle of business content and records. >>

File Plan:

<< Basic File Plan >>

Document Set: << Insert type of documents (Administration, Legal, Financial, etc.) >>

Description: << Description of document set. >>

The rest of the content has been removed from this sample. The entire 2 pages of the document are included in:



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