

Data Retention & Deletion Policy Template

How long you actually keep customer or business data, and how it gets disposed of.

Step 1: Inventory What You Actually Collect

DATA TYPE	WHERE IT'S STORED	WHY YOU COLLECT IT
Customer contact info		
Payment/financial records		
Employee records		
Marketing/analytics data		

Step 2: Set Retention Periods

DATA TYPE	RETENTION PERIOD	LEGAL/BUSINESS REASON

Common Considerations

- ☐ Financial records often have legally required minimum retention periods
- ☐ Employee records may have separate retention requirements from customer data
- ☐ Marketing data with no legitimate reason to keep is a liability, not an asset

Step 3: Define Deletion Process

1. How is data actually deleted when retention periods end?
2. Who is responsible for executing deletions?
3. How do you handle a customer's request to delete their data early?

Step 4: Document It

- ☐ Policy written down, not just practiced informally
- ☐ Available for customers to review if requested
- ☐ Reviewed periodically as regulations or business needs change

This is a starting framework. Actual legal retention requirements vary by industry, location, and data type; have this reviewed against your specific regulatory obligations before treating it as final policy.