

2011 CIO ROUNDTABLE RETREAT

Architecting Our Future

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The Arizona Biltmore
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eSentio
Technologies



E-mail Management

Presented by Robert Kerr

eSentio
Technologies



- *If email was a country, its 1.4 billion users would make it the **largest in the world**. Bigger than China, bigger than the populations of the USA and European Union combined.*
- ***247 billion emails** are sent each day. That's one email every **0.00000035 seconds**.*
- *In the time it takes you to read this sentence, some **20 million emails** entered cyberspace.*

** Forbes, Email Marketing Report*



By 2013 worldwide email traffic will near 507 billion messages per day.

** Radicati, Email Statistics Report 2009-2013*



*The average lawyer receives over
400 emails per day*

** Legal Technology Solutions, February 2010*



Email Management is...

NOT easy

NOT something I can implement quickly

NOT IT's responsibility



Steps to Effective Email Management

- Develop a Records Policy that addresses electronic records – including email
 - Policies must be consistent, enforced and audited
 - Policies require motivation
- Provide tools that make doing the “right” thing “easier”
- Provide interim steps and training on how to prepare for effective email management
- Communicate, Communicate, Communicate

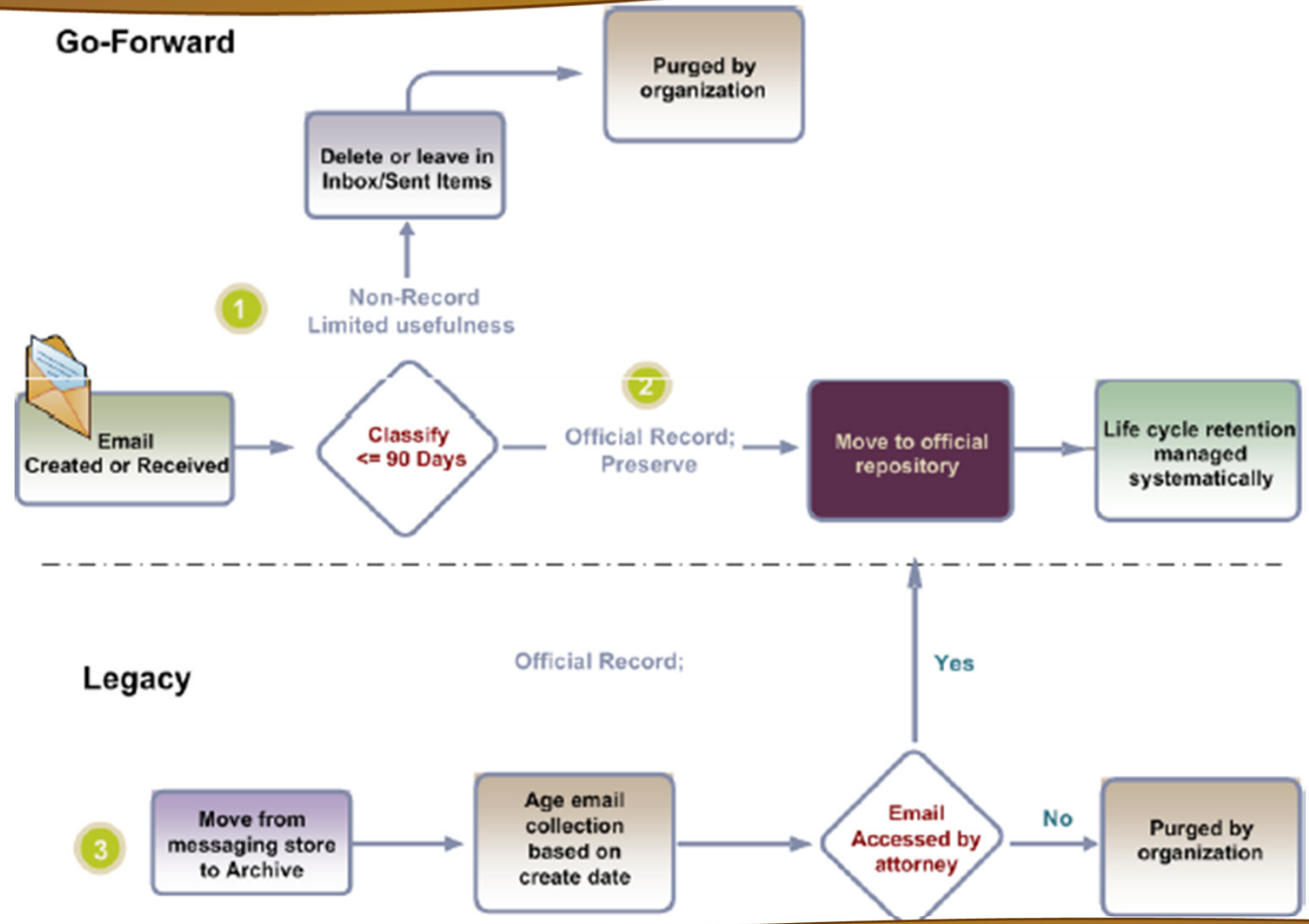


Steps to Effective Email Management

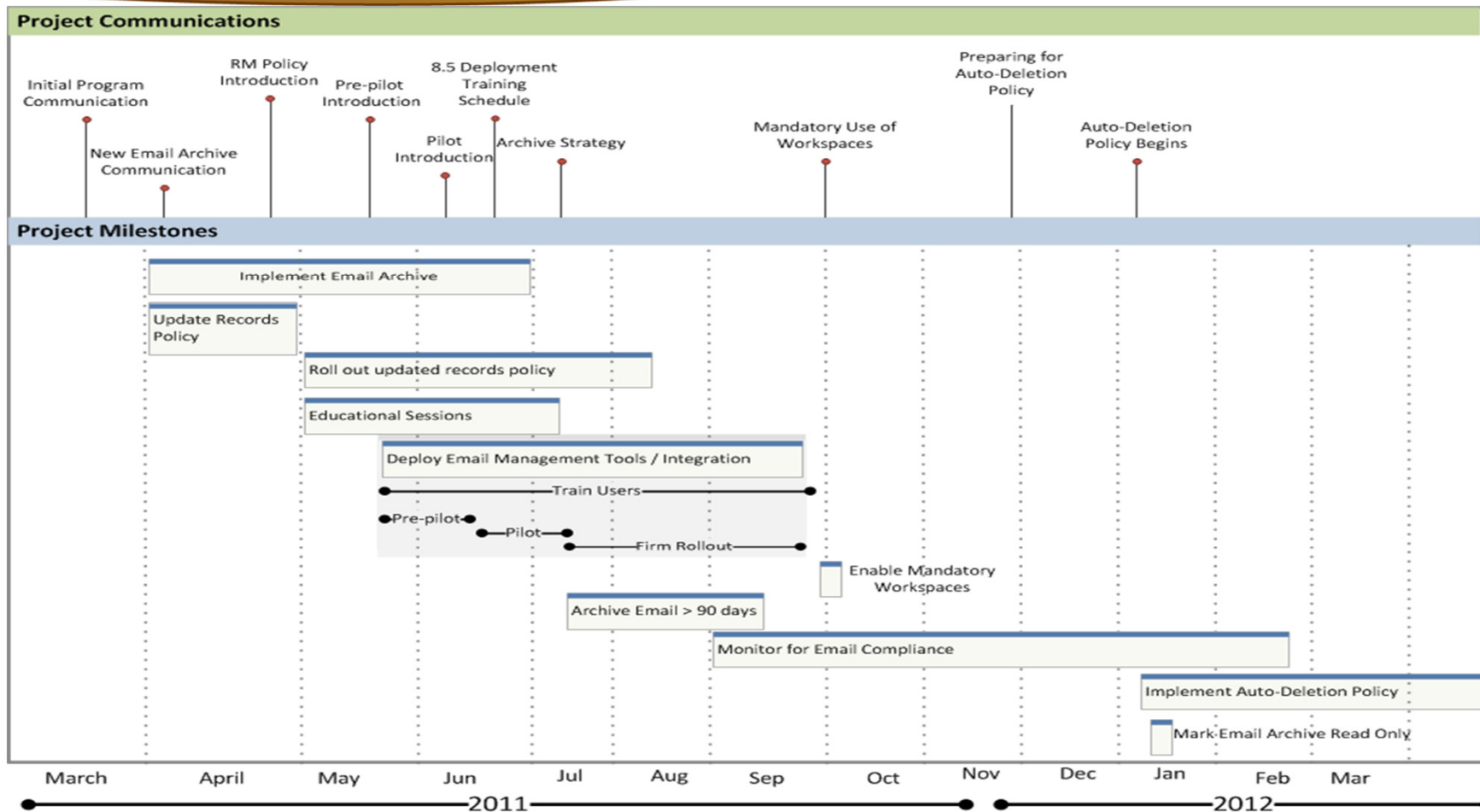
- Communicate, Communicate, Communicate
- Highlight Benefits and Risks
 - Improved user experience via Technology
 - Faster Email performance
 - Tools take into account how practitioners work
 - A more complete Client File
 - Clients have expectation on management of their information
 - Legal teams want to more effectively collaborate internally
 - Firm's want to manage, uniformly, the disposition of information for a particular client and matter.
 - More effective search
 - Find all Client Materials in a single place
 - Find more relevant stuff through searches
- Plan for management of legacy email



Sample Email Workflow



Sample Implementation Timeline



Where are we today?

- Records Policies in process or completed
- Tools to facilitate email management are being implemented
- Communication plans are in place or in process
- Steering Committees are steering
- Fingers are on the delete key



How do we get there?

- Understand the challenge
 - Email must be managed through Policy
 - Firms have successfully done this for legacy Records
 - Paper
 - Electronic documents
 - Email Management is effectively Records Management for Email
 - Email Management represents a fundamental cultural and behavioral change
 - Email Management can represent a multi-year initiative



A Recipe for Success

- Establish a governance structure – steering committee or management committee to review and approve / manage policy changes
- Include lawyers in the design and planning process
- Policies must be consistent and actionable
- Focus on user productivity
- Understand that not all Email is valuable
 - Up to 40% of all email that hits a mailbox (post perimeter filtering) has no business value
- Define metrics that will be used to determine success
- Develop a comprehensive training and communications plan



Effective Communication Planning

- Develop a communications program
 - Branding (to fit firm culture)
 - Develop a theme
- Establish a framework for communications that includes key communications from firm management
- Communicate proactively and keep users informed
 - Establish a schedule for communications so there are no gaps where users lose sight of the project or lose interest
- Communications should drive project success as well as build enthusiasm
 - Engage your Marketing department



Additional Goals

- Coordinate the intersecting communication points from all projects
- Maintain a consistent communication focus on the key goals of each initiative
- Minimize the number of communications sent to users
- Offer a template for developing consistent communications across all projects

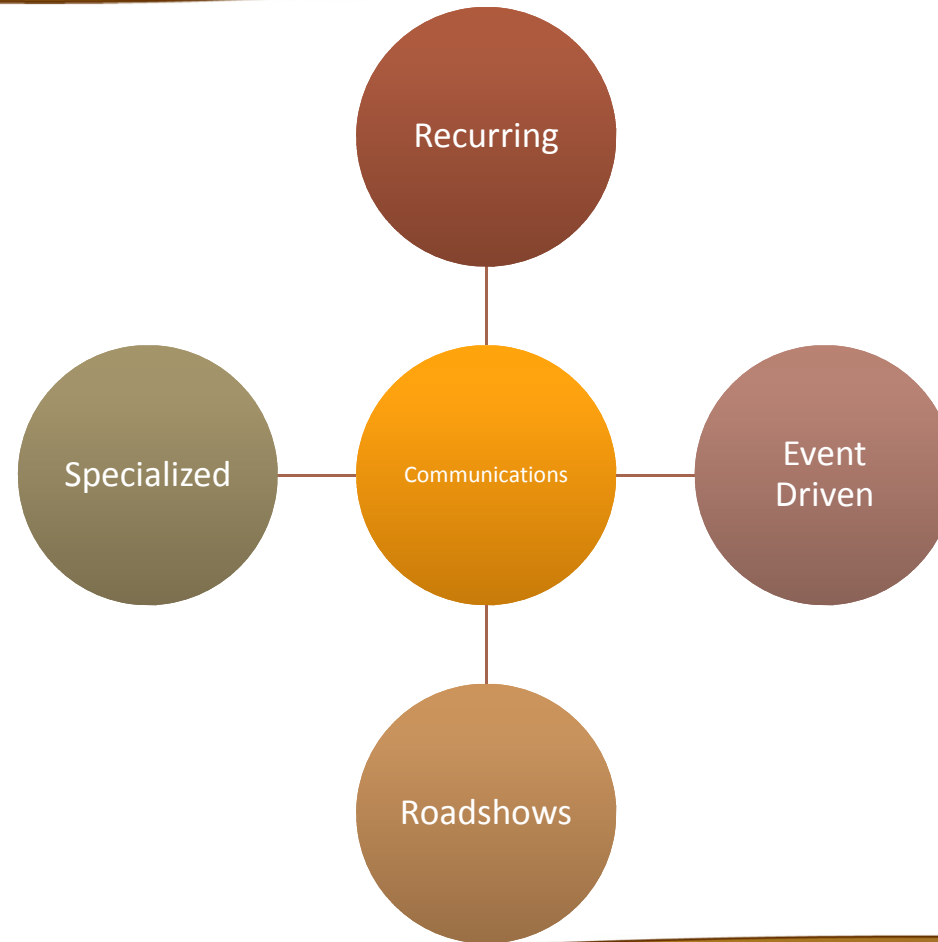


What are we communicating?

- Users want to know:
 - How will this change how I work?
 - Will it affect where my data is?
 - Why are we doing this?
 - Is this a mandatory change?
 - When is this happening?
 - Who made this decision?
 - How do I get my questions answered?



Types of communications



Types of communications

- Specialized announcements
 - General project scope and objectives
 - Policy changes
 - Sent from Firm Management
- Recurring (e.g. monthly) informational message
 - General status
 - Focus on benefits and key milestones
 - Should be interesting (newsletter, intranet, etc.)



Types of communications

- Targeted
 - Specific to a major event (e.g. database consolidation)
 - Highly detailed
- Roadshows
 - Build enthusiasm
 - Promote benefits to users
 - Solicit early feedback



Communication Teams

- Firm Management
 - Defines overall project message
 - Originates messages involving policy and business drivers
 - Sends initial communication; additional follow-up messages as needed
- IT
 - Responsible for all project execution communications
- Training Team
 - Updates training materials to reflect communications
 - Reinforces key messages during classes



Communication Templates

- Standard method for tracking and preparing materials
- May involve multiple communications

Announcement	Communication 1
Subject	iManage Outage 11/17/10
Announcement Date	4/1/2011 and 4/15/2011
User Impact	Communication
Target Audience	Entire Firm
Originator	Applications Manager
Coordinate with other projects/communications	
Message Summary	iManage unavailable during database consolidation.
Required Materials	QRG for working with documents during an iManage outage.
Materials due by	2/28/2011
Responsible Resources	Application Manager
Approval Due by	3/1/2011
Approved by	CIO
Feedback	No



Communication Templates

- Standard method for delivering communication
- Email and intranet posting

Announcement	Communication 1
Subject	iManage Database consolidation
Announcement Date	11/17/10
Target Audience	Entire Firm
Originator	GC
Communication Steps	<ul style="list-style-type: none"> • Send email with announcement details and links to associated materials • Post materials to Mannat Insight
Technical Resources	Intranet admin,
Feedback Mechanism	Feedback sent to address@....
Feedback reviewer	Applications Manager



Discussion

