Email Management! Served with a Twist and a Fresh Perspective
Introducing Our Panel

- Gillian Glass, Practice Support and Records Manager - Farella Braun & Martel LLP
- Kathleen Jimenez, Data Management Administrator - Orrick, Herrington & Sutcliffe LLP
- Doug Smith, Business Solutions Manager - Wiley Rein LLP
- MODERATOR: Leigh Isaacs, Director of Records & Information Governance - Orrick, Herrington & Sutcliffe LLP
Go to [http://ilta.cnf.io](http://ilta.cnf.io) on your mobile device or laptop

What is your role within your organization?
- Records Department
- IT
- Knowledge Management
- Practice/Litigation Support
- Risk/eDiscovery
- Other
Does this feel painfully familiar?
Setting the Stage

- Why are we here?
- Current landscape - the good, the bad, the ugly...not to mention the “A-ha’s” and “Uh oh’s”
- We want to hear from YOU!
Build a Foundation

- Make it EASY to file
- Importance of POLICY!
- Top down support - mandate that email be filed
- Provide clear training - both policy and technology
GETTING DOWN TO BUSINESS

• What’s REALLY happening?
• What have we learned by painful, agonizing experience?
• Is there hope? Or do we resign and live in a van down by the river?
Let’s Discuss

Talk amongst yourselves. I’ll give you a topic...
Scenario #1 - File it ALL

- Original strategy - file all emails into the DMS
- Problem - other documents are “over-taken” by emails
- Potential solutions...
  - eliminate that file type from users’ worklists
  - prevent them from showing up in searches by default
  - invest time in training on search capabilities
Scenario #2 - File the “Records”

- Original Strategy - Instruct people to file emails that were considered a record or “substantive communication”

- Problem - no one has ANY clue what that means and consequently save NOTHING

- Potential Solutions...
  - take the decision away from end users and use predictive technologies to file
  - ramp up training efforts; make it easy
Scenario #3 - Importing is Easy!

- Original strategy - all data brought by laterals will be easily imported into firm systems
- Problem - docs and emails arrive with little metadata
- Potential solutions...
  - give a script that prior firm can use to easily export data with the metadata that you need
  - collaborate in advance with sending firm
Scenario #4 - Train, Train

- Original strategy - continue efforts to train until everyone is filing email

- Problem - worry of non-compliance prevents making improvements to benefit those who are filing

- Potential solutions...
  - learn from accounting
  - explore creative ways in which to audit
Only 10,000?  

I have not failed.
I’ve just found 10,000 ways that won’t work.

Thomas Edison
Why, oh why, won’t they file?

- Fear of leaving it Outlook?
- Lack of time?
- Need for mobile access?
- Concern that emails cannot be found?
Email management, not email filing

- Train users to use email correctly, instead of constantly
- Worst case scenarios (your email ends up on the front page, you break your mother’s heart, etc.)
- Deletion rules to eliminate junk
What is your firm’s culture? Can you take the option away?
Thinking Outside the Box

- Leverage other types of existing organization
- Find your compulsive organizers of inboxes and copy structure to matter folders
- If you have a team site or shared pst, consider using that as a matter-centric base in the records system
- Wisely choose technology/filing tools
Success?

- Emails are getting filed! All our problems are solved!!

NOT SO FAST
Surprise, Surprise

- Transferring files out of the firm [what to release? issues with file review? decisions re release/withholding of internal vs. external emails?]

- Departing employees

- System issues [evault, etc.]

- Security/privacy [collaboration vs. “emails are MINE” mentality]

- Finding where people have saved/tucked emails away (shared drives, psts, etc.)
Surprise...

- Why are MY emails filed when I didn’t file them? [training re: how system files email]
- My searches are cluttered with emails and I can’t find what I need...
- I don’t want my filed emails to be alterable/editable
What Did We Miss?
Questions?