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

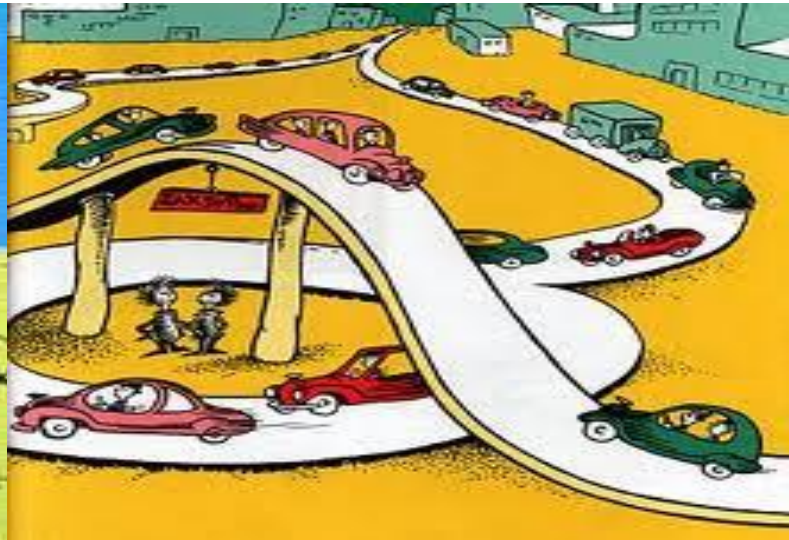- MODERATOR: Leigh Isaacs, Director of Records & Information Governance – Orrick, Herrington & Sutcliffe LLP

Audience Poll

Go to 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?

and I live at the North Pole in a van down by the river.

i/+^ 2013
the catalyst

Let's Discuss

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?
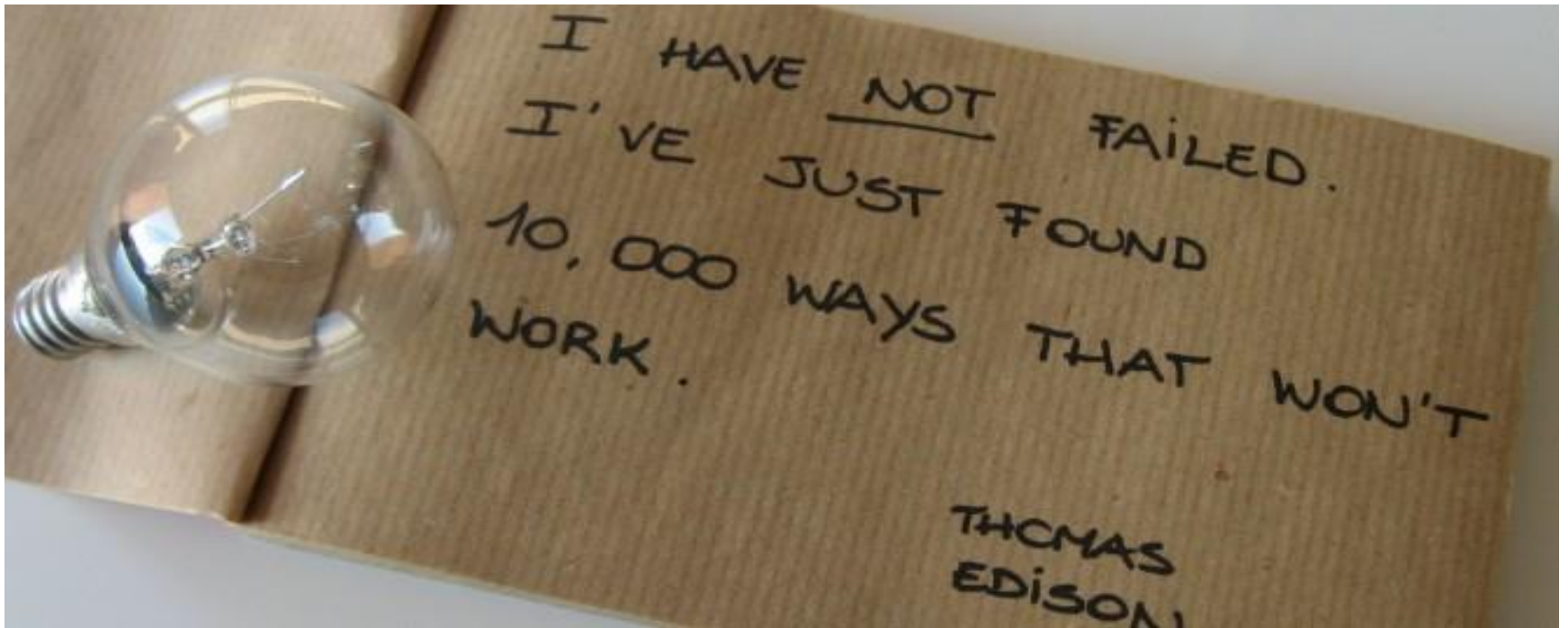
Why, oh why, won't they file?

- Fear of leaving it Outlook?

- Lack of time?

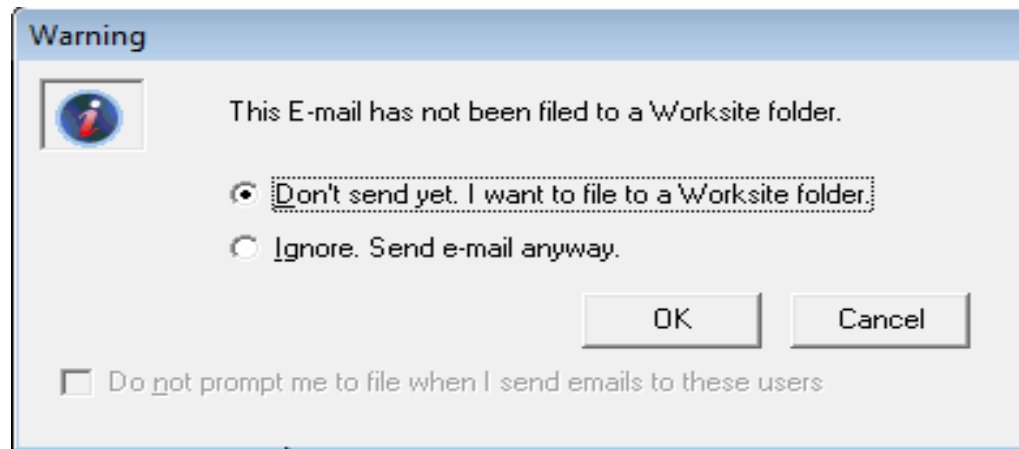- Need for mobile access?

- 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

Culture Club

- What is your firm's culture? Can you take the option away?

Warning

This E-mail has not been filed to a Worksite folder.

- Don't send yet. I want to file to a Worksite folder.
- Ignore. Send e-mail anyway.

OK   Cancel

Do not prompt me to file when I send emails to these users

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?