

# Dreams Can Come True: E-Mail Management Success Stories

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## **Chris Romano**

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Ward and Smith, P.A.

## **Derek Schueren**

Co-Founder and VP of Business Development  
Recommind

## **David Hobbie**, Moderator

Litigation Knowledge Manager  
Goodwin Procter LLP

# Ana Schuett

- Sr. Manager of Practice Support
- 950 lawyers, 14 US and 4 INT offices, practices include Litigation & IP, Labor, Corporate, Finance, Government, Environmental
- Exchange 2005, Outlook 2003, Zantaz Archive, MC Autonomy 8.5, Filesite (8.2) and Desksite (8.2)
- HBRCO Fastfiler

# Chris Romano

- CIO, Ward and Smith, P.A.
- 80 Attorneys, 5 offices in North Carolina, general practice including litigation, creditors' rights, trust & estates, patent, etc.
- MS Exchange 2007/Outlook 2003
- Netdocuments

# Derek Schueren

- Recommind Inc
- Leader in Enterprise Search systems for Large Law Firms (Over 40% of Top Global Firms customers)
- Introduced Decisiv Email to market – Intelligent Email Management and Archiving Product
- Working with Top Global Firms to help them maintain a complete electronic client-matter file through auto and semi-automated email filing via Decisiv Email

# David Hobbie, Moderator

- Litigation Knowledge Manager at Goodwin Procter LLP
- Blogger and Enterprise 2.0 evangelist
- 850 lawyers, 10 offices in US, satellites in London and Hong Kong
- iManage 8.3 with DeskSite & FileSite, moving to 8.5 with MCC in January 2011

# Why Is Email So Important?

- Key location of all client correspondence
- Key prior work product / knowledge / relationship repository

# Baker Robbins “Email Wellness” Survey\*

- 86% consider email important for long-term success of their organization
- On average attorneys spend 2 hrs/day spent processing email, 1 / 5 spend 3+ hrs/day
- Survey measures success by email-to-documents ratio
- Tracks success of policy implementations

\*[http://www.brco.com/uploads/MB\\_Email\\_Wellness\\_Survey\\_2009.pdf](http://www.brco.com/uploads/MB_Email_Wellness_Survey_2009.pdf)

# Agenda

- Drivers
- Approaches to Implementation
  - Application issues
  - Knowledge Management Issues
  - Records Management Issues
- Lessons Learned
- Future Plans



# Drivers/Pain Points

*Hunton & Williams LLP*

- **Business**
  - Compliance
  - Collaboration
  - Staffing
- **Technology**
  - Continuity
  - Outlook Performance and Stability
  - Growing Content Repositories

# Drivers/Pain Points

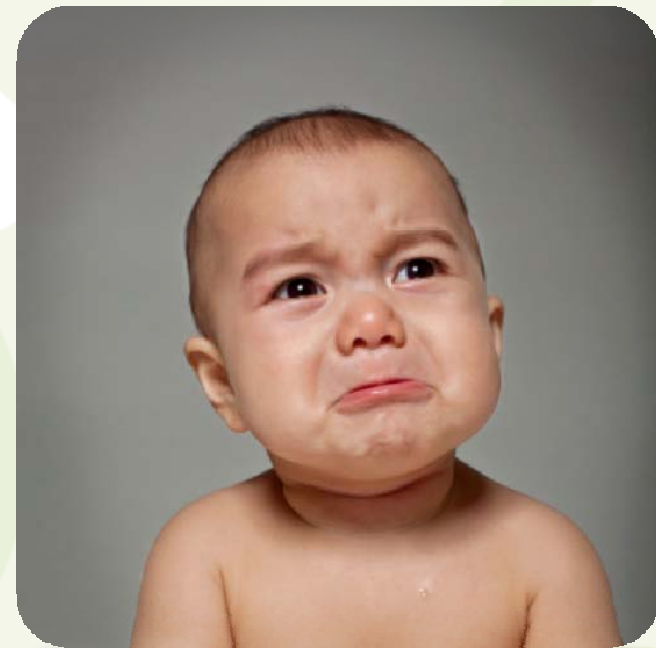
*Ward and Smith, P.A.*

- PST Hell. No cohesive way to get a handle on storage, searching, or matter-centric management.

# Drivers/Pain Points

*Recommind Inc*

- The 4 C's:
  - **Compliance**
  - **Continuity**
  - **Collaboration**
  - **Client Demands**



# Approach

*Hunton & Williams LLP*

- Make it EASY to file
- OGC Mandate (KEY!)
- Email Fitness Program
- Personal Focus and Flexibility
- Demonstrate improvements to paint points - drivers

# Approach

*Ward and Smith, P.A.*

- Leap of faith: use document management solution as email management.
- Marketing: show features through firm Intranet, videos, etc.
- Waited to implement EMS for six months. Comfort level needed with Netdocuments.

# Approach

*Recommind Inc*

- A new problem needed a new solution
  - **Design for email from day one**
  - **Make filing easier, not harder**
  - **Understand different user types**
  - **Retrieval is just as important as filing**

# Lessons Learned

*Hunton & Williams LLP*

- One size does not fit all
- Develop Scenarios, TEST, RETEST
- Time and Resources
- Partnership with Firm Leadership is KEY
- Technology hurdles still exist

# Lessons Learned

*Ward and Smith, P.A.*

- Test, test test. Train, train, train.
- Glad we waited. Rolling out new DMS and EMS would have been a nightmare.
- Establish deadlines, then be flexible. Work with attorneys to get more goodwill toward the new system.
- Revisit best practices; folder structure, search criteria.



# Lessons Learned

*Recommind Inc*

- K.I.S.S.
- ‘Carrot’ and ‘Stick’ are needed
- Find your champions
- Adoption = Success



# Future Plans

*Hunton & Williams LLP*

- So you now file 100,000 emails/week. Great, now what?!
- Deal with all the OLD content (archives)
- Flexibility with Folder Structures
- Continue 1-1 work with stragglers
- Focus on DELETE

# Future Plans

*Ward and Smith, P.A.*

- Lobby Netdocuments for more EMS enhancements, but no plans to move off the platform.
- Work with attorneys on email management; do you need to save everything? That's an ongoing discussion and culture change as we seek to change the way we archive physical records too.

# Future Plans

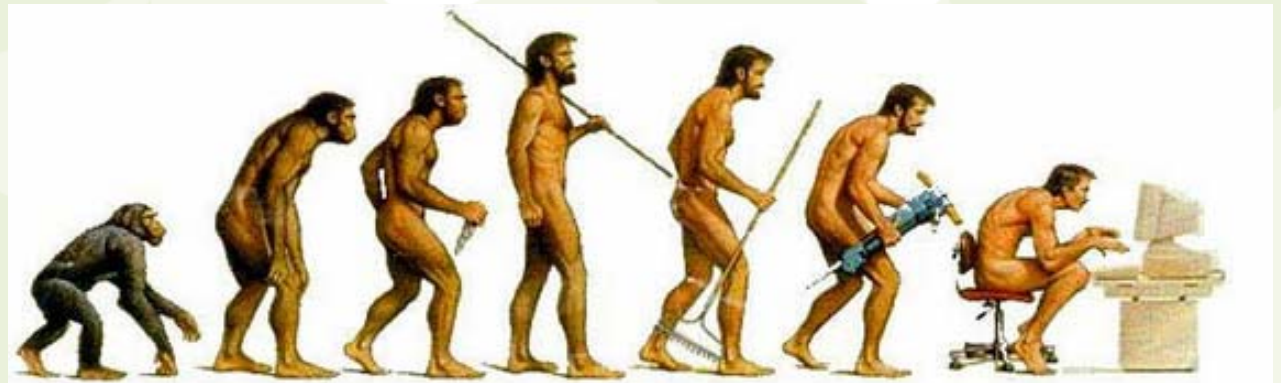
*Recommind Inc*

- Mobile access
- SharePoint Integration
- Folder Syncing
- Final Documents



# Final Thoughts

- Lets end with the 4 E's:
  - **Educate**
  - **Evaluate**
  - **Enable**
  - **Evolve**



# Questions?

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