



THE DEFINITIVE GUIDE TO EMAIL MANAGEMENT

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WHAT IS EMAIL MANAGEMENT AND WHY DOES IT MATTER?

Research - and experience - have shown us that emails are distracting. According to one study, it takes upwards of 20 minutes for an employee to regain momentum following an interruption¹, and with the average office worker receiving about 126 emails each day², it's clear that companies are losing out on massive amounts of employee focus.

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Especially in the context of a legal firm, emails represent important matter communications and documents that need to be read, digested, filed, and secured – which is why many attorneys anecdotally “live out of their inbox” - often cobbling together filing systems to use as running task lists, file storage, and more. This is where email management systems can help.

Email management involves the systematic control of all email communications within an organization in order to mitigate the risk of a compliance or data breach.

Email management systems (EMS) built for professional services provide tools for the proper filing and securing of client communications without employees ever having to leave their inbox, keeping professionals focused on the current tasks at hand and protecting your company's sensitive data.

How Can Email Management Protect My Organization?

As a solo practitioner or small firm, you're understandably focused on growing the business, meaning email management may be overlooked. But for organizations, improper management of emails can be devastating if you're ever audited or experience a data breach.

What steps do I need to take in order to protect my firm?

It's critical that small firms implement organization-wide policies and procedures for how to handle email communications in accordance with the American Bar Association's (ABA) ethical standards.

A great place to start is asking these two important questions:

1. When do we declare an email, copy of a message, or an entire thread/conversation a record?
2. What should we base record decisions on? (i.e. sender, receiver, attachments, etc.)

CHOOSING THE RIGHT EMAIL MANAGEMENT SYSTEM (EMS)

While some organizations wait until catastrophe strikes before adopting an email management system, success often lies in being proactive, not reactive. The right EMS not only improves your team’s productivity but can also enhance your client’s experience.

When evaluating your EMS options, we recommend taking a look at four key areas:

ORGANIZATION	PRODUCTIVITY	CLOUD HOSTED	SCALABILITY
A robust EMS will provide built-in organization and AI features, making it easy for employees to file communications and documents in the right place.	EMS tools built for your profession should integrate directly with the software you use daily, cutting down on time spent outside of production systems.	Cloud software carries many benefits including accessibility, faster processing, and cost savings.	Like most entrepreneurs, you’re likely focused on growing your firm. Selecting a system that can grow with you will save you time and headache in the future.

Let’s take a closer look at each of these areas.

Optimized for Organization

Implementing an organization system for your business is no small task, which is likely why only 7% of businesses³ believe they have good visibility over all mission-critical company information. This suggests many firms are at risk of errors and mishandled information.

To reduce information handling errors, a robust EMS will integrate directly into your document management system and leverage artificial intelligence (AI) to enable even the busiest employees comply with standardized policies.

ndMail, for instance, integrates directly with structures an organization creates in NetDocuments and uses AI to make communication and document filing suggestions based upon behaviors across the business. This means your teams will quickly be able to file every communication and attached document directly into a client’s secure matter file without ever leaving their email system.

TIP:

EMS such as ndMail by NetDocuments often come equipped with AI that helps employees quickly file communications into the correct matter file without ever leaving their inbox so employees can save time, protect the firm, and comply with ethical policies prescribed by the ABA.

Enhanced Productivity

Increased organization isn't the only way to improve productivity in the workplace through email management. There are also key features to look for in an EMS to continue improving internal processes and cut back on the manual effort that takes valuable time from your employees, and leaves room for increased error.

Specifically, a strong EMS should have the following capabilities:

Automated Workflows

Automation increases productivity by decreasing delays and errors caused by manual labor. Further, by automating the tagging, distribution, and storage of emails, you're also increasing the efficiency of task delegation and ensuring accountability.

Integrations

An email management system should seamlessly integrate with the apps and tools your team is using, to make for smooth-running projects. By connecting with important tools, your EMS will eliminate silos and increase collaboration.

Conversation Filing

Emails often turn into long threads, and filing each reply separately quickly becomes redundant. Conversation filing makes it possible for you to file an email once and automatically files subsequent emails in the same location.

Anywhere Access

The best EMS will allow you to access, file, and search emails from anywhere, on any device. This includes mobile phones, tablets, and your laptop.

Cloud Hosted

A 2016 survey⁴ found that nearly 90% of the companies surveyed worldwide were using on-premises email (or some other legacy option). Fast forward to 2019, and 81% of all enterprises have a multi-cloud strategy⁵ already laid out or in the works, which includes email as a cloud service.

EMS with cloud-based filing provide a host of benefits for organizations. For example, businesses using ndMail have seen an improvement in speed and efficiency of work, are relying on less device capacity, and drive cost savings.

Speed-to-Delivery

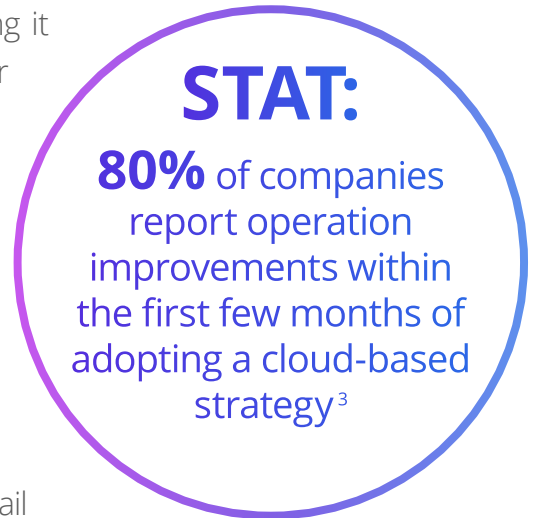
Cloud-hosted EMS solutions offer anywhere-access, making it possible for employees to do work on any device no matter if they're in the office, courtroom, or finishing up important tasks at home. This accessibility leads to faster delivery of services and an overall better client (and employee) experience.

Faster Processing

Typically, cloud solutions free up your device's processing power via cloud-to-cloud filing or server-side filing, which means your EMS is communicating directly with your email service rather than using your device's processing power which keeps applications running smoothly.

Cost Savings

Cloud services can be cost-effective for organizations. According to Multisoft, small and medium businesses find it 40% more profitable to employ third-party cloud platforms than maintaining an in-house system³.



Scalability

More than simplifying workflows, as you grow, an EMS can become a competitive advantage from both training and technical standpoints.

Onboarding New Attorneys

Consider the time typically required for onboarding a new attorney: how long does it take them to understand the status of your matters or projects before starting to contribute? What if you were suddenly incapacitated - could an attorney step in and succeed you quickly?

An EMS can shorten the time it takes for new attorneys to become acquainted with your caseload as you utilize it to quickly organize each communication and attachment into your document management system, such as NetDocuments. This means new attorneys will be able to pick up where you left off and provide the same level of professionalism and care your clients have come to expect from you.

Technical Concerns

There are a number of ways an EMS can help scale your business from a technical standpoint. Consider these factors as you explore EMS options so you don't bump into limitations in the future:

STORAGE CAPABILITIES	FUNCTIONALITY	ADVANCED FEATURES
If your EMS integrates with your document management system, emails can be deleted once filed – freeing up storage space on your email server.	Look for an EMS that provides solutions for both small and enterprise organizations, consistently investing in feature development for companies of all sizes.	EMS systems can provide advanced collaboration you may need at scale.

HOW TO IMPLEMENT AN EMAIL MANAGEMENT SERVICE IN YOUR BUSINESS

When rolling out an EMS to your team, consider these best practices for higher adoption rates:

1. **Involve key stakeholders in the decision**
2. **Communicate changes early and often**
3. **Extoll the benefits**
4. **Training sessions**
5. **Find and designate superusers**
6. **Keep optimizing**
7. **Complete support**

Let's take a closer look at each of these recommendations.

1. Involve key stakeholders in the decision. Ensure that the change of technology will benefit the majority of users, and that the technology will actually have a meaningful impact on your team's day-to-day workflow.

A common mistake when considering a technology decision which will affect the entire company is to limit the decision-makers to only a few technical personnel or a small, independent workgroup. To ensure a smooth transition, and buy-in, try to include participants from every department in the business to hear their concerns and implement the best solution for the entire business.

2. Communicate changes early and often. Choosing the right EMS for your team is only one step in the process. For a true success, you have to communicate well with the entire business.

The best way to approach communication is to start early in the process. Don't drop a major change on your company with little or no warning. Instead, let everyone know about the upcoming change

and provide frequent information about the timing and impact. You may consider training sessions as you build up to the implementation to help in the smooth transition.

3. Extoll the benefits. As you make the move, don't jump straight into the training on how the system will be used. Take the extra time to walk employees through how the new system will benefit them in their daily workflow.

Your team wants efficiency and simplicity. The training should help employees quickly understand how to use the new system and experience the benefits.

Also recognize the learning curve is likely to cause some interruptions and frustrations so the better the communication, the more likely a successful adoption.

4. Conduct training sessions. Once the technology has been rolled out, keep up the momentum. Don't rely on a single training session. Continue to check in on users and provide additional training sessions. If possible, make your communications and training sessions engaging. One idea is to try a lunch and learn where employees can step away from their desk and enjoy a meal while going through the new training.

TIP:

Not all cloud EMS providers use **server-side filing**. During your evaluation, be sure to ask about how they communicate with your email client to ensure the EMS won't slow you down.



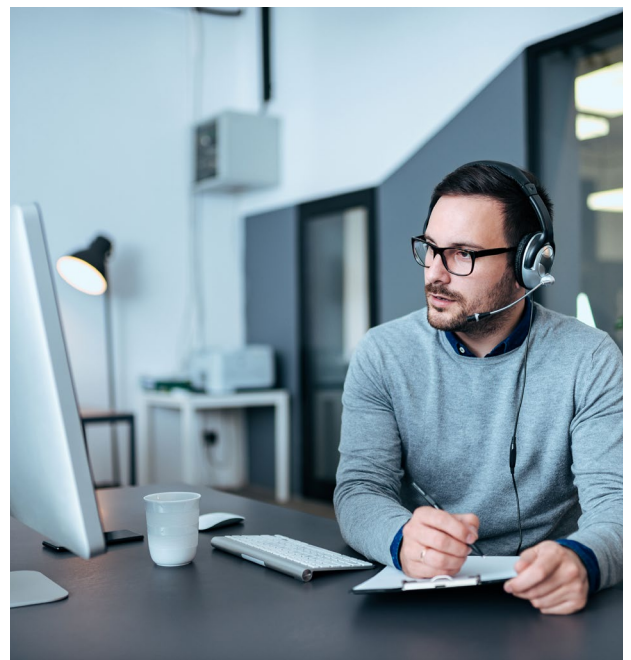
5. Find and designate superusers. Find the influencers on the teams and focus on getting them on board with the change. Once they're invested and excited about the new email management system, they can help get others motivated.

You should be looking for those employees who network well, have strong communication skills and have an influence on others in their department.

6. Keep optimizing. Choosing and implementing an email management system is just one part of ensuring success and adoption. Continue reviewing the available features and functionality offered. As your business grows and your needs change, you may want to modify the features you are using.

7. Utilize customer support. Another key feature when choosing an email management system is to consider a service provider who offers your team complete support for all phases of implementation and transition. Having strong support empowers your team with a step-by-step process for the best way to get an issue resolved. You don't want long delays or anyone feeling stuck. As much as you try to equip the team with the best steps, there will be bumps along the way.

Make sure they know what to do when they run into an issue so it can be resolved quickly.



CONCLUSION

Professional service providers are overwhelmed with email. Not only due to the sheer number of communications they receive in a day, but because of the work required to properly digest, file, and organize email communications.

By adopting an EMS, businesses provide employees with the tools they need to stay focused on tasks and adhere to compliance procedures - leading to more time spent on production, increased data protection, and most importantly more time to devote to providing world-class customer experiences.

ABOUT NETDOCUMENTS

NetDocuments is the leading cloud-based document and email management solution to securely and easily store and organize documents on one secure platform.

With NetDocuments, users can create, open, edit, version, and save documents in the context of projects or matters. Additionally, users can share and collaborate with others, or file email to a shared location.

With 20 years of experience, 2,750 customers (companies) worldwide, and our ability to manage billions of files each day, NetDocuments is a critical component of any organization's digital workspace.

Make the move to NetDocuments and get speed, mobility, and industry-leading security.



Your email management just got smarter. With ndMail from NetDocuments, you can spend less time on administrative tasks and more time focused on your clients (and billable hours!)

ndMail is a more efficient way to file, store, and organize email without ever having to leave Outlook. Plus, with our Office 365 add-in, you can predictively file emails in NetDocuments from the Outlook mobile app, Outlook web, Outlook for Mac, and Outlook desktop.



Easily combine multiple documents into a single, indexed PDF and remove the manual and tedious task of building document sets for everyone in your organization. With documents compiled and organized into structured sets, you can publish it as a single, hyperlinked PDF for easy digital distribution.

POWERFUL EMAIL MANAGEMENT IS WITHIN YOUR REACH.

Schedule a demo for ndMail from NetDocuments today.

netdocuments.com/demo

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