eDiscovery & Information Governance - Tips for Effectively Managing Your Email

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In this information age, email is a fact of life. We email with our employers, employees, clients, friends, family, neighbors, and often with people we have never met. Email is an instantaneous form of communication that allows us to stay connected and provide information to one another, business-related or not, at any time and from nearly anywhere. We email so frequently, on so many topics, with so many people, that managing our ?mailbox? soon becomes overwhelming. When this happens, we usually follow one of three paths ? we do nothing and let the email pile up indiscriminately; we furiously file and save based on our own rules or system, as esoteric as it may be; or we delete everything in one fell swoop. None of these methods, however, solves the underlying problem of keeping what we need or want to keep and regularly disposing of the rest.

Are emails ?business records?? It depends. It is the content of the email that determines whether we save it, where we save it, and for how long we save it. While many emails are business records that belong to the company and should be retained for a certain period of time, most of the emails we save because we may ?need? them in the future or because we are ?too busy? to do anything else are NOT business records and can and should be deleted regularly. This article provides some common-sense tips to help you manage your email like a pro.

First, you need to understand how your company or organization defines a business record. Emails that are business-related, legal, regulatory or otherwise of some value to your company?s operations generally are considered business records and should be retained for some set period of time. Emails that are personal, transitory or simply informational generally are <u>not</u> business records and should be deleted regularly (*e.g.*, after reading, at the end of the day, at the end of the week).

Some positive steps you can take to better manage your email include:

- using subject lines to describe what the email is about, which helps you to determine easily what to do with it;

- before sending an email to a large group, take a minute to think: does everyone on the list<u>really</u> need this information?;

- when using distribution lists, select one individual as the record-keeper so everyone else can

delete with a clear conscience;

- using the Microsoft Outlook ?Rules and Alerts? feature to organize your inbox, for example, by selecting certain senders? emails to go directly to a specific folder; and finally,

- making it a habit to ?clean? your inbox regularly, not only when you become overwhelmed.

As with any list of ?do?s,? there also are some ?don?ts? to consider:

- don?t hit ?reply all? unless absolutely necessary;

- don?t save all the ?back and forth? in an email chain - save only the final communication;

- don?t save emails in folders with generic names (*e.g.*, Personal or 2011);

- don?t forget your ?Sent Items? folder ? emails often are stored there indefinitely unless and until you file those emails or delete them; and finally,

- unless you want ?the world? to read your email, <u>don't send it</u>.

As the volume of email we send and receive every day increases at a seemingly exponential pace, following these simple tips will help you avoid being overwhelmed and allow you to manage your email effectively.

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