

# Facing Facts: Email is Broken

Solving Email for the Modern Business



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## Introduction

Nearly half a century since the first electronic message was sent, “email remains the most ubiquitous form of communication”.<sup>1</sup>

Despite email’s longevity and its pervasiveness in our lives, email management policies and practices have struggled to keep pace. As a result, opportunities abound to increase productivity, decrease costs, capture new value and manage the business risks presented by email.

This white paper explores the state of email in 2016, and reflects on five key email pain-points that continue to plague modern businesses throughout the world.

5 Key Email Pain-Points		
	Volume	We just get way too much email.
	Filing	It’s too difficult. Filing is unrewarding, slow and inefficient, and, therefore, it’s done very badly.
	Search & Retrieval	It’s slow, painful, often fruitless (due to the issues with filing), and therefore plagued with doubt.
	Archive & Destruction	It’s complex, costly and usually overlooked. Most businesses leave themselves exposed to serious risk.
	Collaboration	Email is a 1-to-1 mode of communication (or 1-to-a-few with the dreaded cc/bcc). By its very nature, it’s closed and non-collaborative.

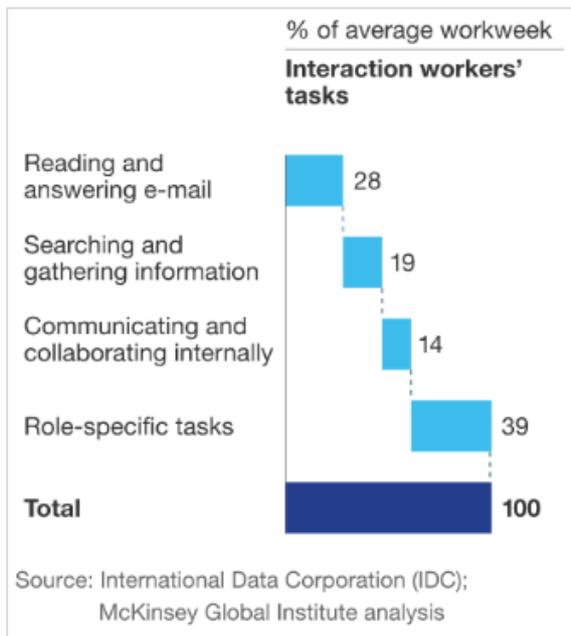
## The Issues of Email Explored

### Volume

Email is no longer just a convenient way for organisations to communicate; it’s now *the primary way* most business people engage with colleagues, suppliers, stakeholders, clients and customers alike.

In 2016, of 215.3 billion emails transmitted worldwide, 116.4 billion are business-related and the average knowledge/interaction worker can be expected to manage 123 emails per day.<sup>2</sup>

According to McKinsey & Company, reading and answering email consumes a gobsmacking 28% of an interaction worker’s typical workweek.<sup>3</sup> That equates to 11.2 hours per week, or over 12 working weeks per year, spent just on reviewing and responding to emails.



With worldwide use expected to increase at a rate of about 5% per annum, and over 3 billion people (nearly half of the world's population) anticipated to be using email by year-end 2020,<sup>4</sup> there's little respite in sight.

## Filing

Further compounding the issue of how much email we receive are the hopelessly slow, inefficient and unrewarding filing practices that plague most organisations.

A report from the University of Massachusetts-Amherst notes that "despite the extensive use of email... policies, rules, and email etiquette have developed haphazardly,"<sup>5</sup> and in the absence of widespread understanding of email best practice, individual organisations have imposed manual filing and record-keeping processes that are both time-consuming and nearly impossible to enforce.

Effort and enforcement are at the crux of the issue of filing.

Conservative estimates indicate that "people spend an average of 10% of their total email time filing messages."<sup>6</sup> That's 13 minutes each day; over a week of every year dedicated to filing alone.

Based on the average Australian income,<sup>7</sup> such manual filing practices cost organisations \$2,274.69 per employee, per annum – in raw labour cost.<sup>8</sup>

Additionally, most organisations have neither the ability nor the appetite to regularly audit email records and ensure users' compliance with filing protocols. So adherence is left to the goodwill of individual users and workers who are already struggling to keep up with the sheer volume of correspondence.

Add to this inefficient processes, clumsy filing structures, poor naming protocols and quickly, the personal reward for filing an email properly (i.e. the ability to retrieve it with ease, at some future date), is simply too little and too far removed to justify the effort required in the moment. As Oi Software's

CIO, James Lewis, so adeptly put it: "The trouble with manual filing is the mindset that finding the email is a future-me problem, or worse yet, a future-you problem, and current-me is very busy."

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In the face of all of these things, expecting workers to manually file 100% of their emails, with 100% accuracy, 100% of the time, is simply a recipe for failure.

Leaving such an important process open to human error and oversight undermines the entire record and allows doubt to creep in ("I thought I replied to that..." "Could an email be missing?" "Did someone forget to file something?" "Did someone delete something they shouldn't have?"). Until organisations can ensure 100% of communication is captured in a systematic way that does not rely on human intervention, there will always be questions surrounding the accuracy and completeness of the archive. And, without a complete and accurate archive, organisations leave themselves unnecessarily exposed to considerable institutional knowledge, business continuity, governance, legal and regulatory risks.

## Search & Retrieval

To further exacerbate matters, we know that the most common filing practices are actually counter-productive. That is, they don't actually make it any easier to recall a message in the future – and sometimes they even make it harder.

In a study by IMB Research, *Am I wasting my time organizing email? A study of email refinding*, researchers looked at two main types of email management strategies that relate to recalling (or 'refinding') emails: preparatory methods and opportunistic strategies.

The study found some users "expend considerable *preparatory* effort creating complex folder structures to promote effective refinding,"<sup>9</sup> where others relied on *opportunistic* methods like broad-based metadata and text searches, scrolling, filtering and conversation threading.

The data from the IMB study support the case for opportunistic access, and found that those "who create complex folders, indeed rely on these for retrieval, but these preparatory behaviors are inefficient and *do not improve retrieval success* [emphasis added]."<sup>10</sup>

In other words, whilst preparatory methods for managing email are common in most workplaces, the time spent on filing isn't actually making retrieval any faster at all and "the inability to effectively manage communication means lost information, and reduced responsiveness [and] these have clear negative outcomes for both individual and corporate productivity."<sup>11</sup>

## Archive & Destruction

Once an organisation has overcome the considerable hurdles of volume, filing, search and retrieval, the next major email pain-point is archival and destruction.

It's important to clarify, firstly, the difference between backups and archives:

- Backups are multiple, point-in-time snapshots of an organisation's data. While they are a complete image of the "document, server, or even the entire organization"<sup>12</sup> at a specific moment in time, they are an incomplete representation of the organisation's data history. That is, backups do not capture inactive information and the information they do capture is disorganised and held as multiple copies; this makes recovery of that information costly, complex and time-consuming.
- Archiving, by contrast, offers a full picture of an organisation's data *over time*, and structures the information in such a way that future discovery can be easily facilitated. Archiving, by its nature, also ensures that a complete picture of the data exists (i.e. it captures deleted data, data newly created, data moved or changed outside of the retention period of a standard backup).

In summary, "backups help recover information and processes in current use in case they are interrupted, corrupted, or lost. Archives help discover details of information and processes not in current use, in case they become useful again."<sup>13</sup>

Despite its importance, more than 50% of organisations report that they still do not have systems in place to automatically archive email<sup>14</sup> and in those that do, these systems are often woefully insufficient. This isn't due to ignorance or carelessness; it's simply that most archiving solutions are costly and incredibly complex – and appropriate destruction of data in these archives is even more so.

Maintaining a complete and up-to-date archive of email correspondence is crucial for a number of reasons, outlined below.

### *Retention & Destruction Regulations*

All records pertaining to an organisation's business activity, including financial records and employee data, are subject to data retention regulations.

Further, many professions (e.g. banking, financial services, legal, medical) have an additional layer of complexity, with legislative requirements dictating the retention of customer, client or patient information.

Organisations also have a responsibility to destroy or depersonalise data which have outlived their usefulness, subject to a combination of laws, regulations and company policies. Without an email archiving system, the complex task of first locating, and then appropriately destroying, documentation is left to individuals. This is, of course, not practical; relying on manual data destruction processes not only consumes vast amounts of labour and time that could otherwise be spent on more productive activities, it leaves the organisation's archives exposed to human error, oversight and ultimately, unnecessary risk.

### *Regulatory Compliance*

For a small business operating in a relatively unregulated industry, managing compliance is fairly straightforward; a self-employed individual understands the rules, and operates within them.

As an organisation grows in size, however, or as the regulatory environment becomes more complex, compliance responsibilities and commercial risks also increase.

For many professions (like law, medical and finance), various regulatory instruments dictate the provision of specialist advice and service; that is, who can provide it, how it is to be delivered, what kind

of advice can be given and in which circumstances. Where organisations operate in a highly-regulated profession and have more than one representative who provides such advice or service, it becomes increasingly challenging for the organisation to guarantee its compliance with various laws and regulations. How can it ensure each of its people are consistently upholding their legislated responsibilities whilst acting as a representative of the business?

Nothing, of course, is foolproof all of the time. However, with 87% of all business communication now conducted via email,<sup>15</sup> having a comprehensive archive is one way organisations can get 'audit and regulator-ready'.

Without access to an email archive, audits by, or information requests from, regulators are extremely costly and effort-intensive endeavours. Frequently, specialist IT intervention is required to retrieve data, incurring additional costs to the organisation, and in particularly sensitive investigations, posing further reputational risk.

By contrast, maintaining a comprehensive email archive allows an organisation access to its full email history which can be reviewed for compliance or regulatory reasons; either retrospectively or pro-actively. That is, archives enable managers and compliance personnel to conduct on-the-spot audit of advice and services which have already been provided. Most powerfully, however, is the potential for organisations to pro-actively identify, or even anticipate, high-risk activities or possible regulatory breaches, as they become increasingly dexterous at delving into and leveraging their data. In this regard, email archives are not passive; they have a story to tell and act as a rich source of information which can be mined for insights, using a range of keywords, phrases and themes. These insights allow organisations to take corrective action before seemingly inconsequential issues become significant risks to the business, regulators and the organisation's customers or clients themselves. From a compliance and regulatory perspective, this is an incredibly powerful (yet frequently overlooked) benefit of email archiving systems.

### *Disputes & Litigation*

In the event of a formal complaint, or during litigation discovery, an organisation may be required to produce all relevant evidence – including records of email correspondence.

The state and completeness of one's email archive dramatically affects the ease of retrieval and cost of assembling relevant information, as well as the ultimate outcome of the dispute.

The issue of 'what is relevant' is a matter of both perspective and timing; what may seem to be an unimportant message today, may become the critical piece of evidence tomorrow. For example, an "out of office" email may someday help document an employee's attendance record, an old product brochure help resolve a warranty question, or an expense report help prove a tax deduction."<sup>16</sup> The only way to ensure relevant information is on hand, therefore, is to maintain a complete and tamper-proof email archive.

Organisations that fail to do so, and neglect "to preserve electronic content properly are subject to a wide variety of consequences, including... court sanctions, directed verdicts or instructions to a jury that it can view a defendant's failure to produce data as evidence of culpability."<sup>17</sup>

Maintaining comprehensive email archives also provides a very valuable data source which can be used to quickly gather information in the early stages of an investigation, and assist with risk assessments and determining liability.

Put simply, an email “archiving system can help [an] organization to understand its position early on, either avoiding unnecessary legal fees or an adverse judgment, or reducing its costs by proving the sufficiency of its case.”<sup>18</sup>

### *Intellectual Property (IP) & Data Insights*

Osterman Research estimates that up to “75% of a company’s intellectual property is contained within email.”<sup>19</sup> Failure to archive electronic communications leaves an organisation seriously exposed to data disasters and the risk of institutional knowledge loss.

Additionally, as organisations become much more adept with big data, the potential to tap into a storehouse of legacy information (including historical emails) becomes tremendously valuable.

With the right tools, idle data suddenly becomes rich with insights on the business, its employees and clientele. As mentioned earlier in this white paper, such insights also allow organisations to pro-actively identify, even anticipate, high-risk behaviours and regulatory breaches.

### *Data Storage & Growth Management*

In a recent EMC study on the challenges faced by IT professionals, researchers asked: “what keeps you awake?” to which the two most common responses were:

- Managing storage growth (79%); and
- Designing, deploying and managing backup, recovery and archive solutions (43%)<sup>20</sup>

With message storage increasing by 30% annually, thanks to the “dual drivers of cheaper disk storage and the increased size of email messages,”<sup>21</sup> organisations are grappling with how to best manage explosive data growth.

Many policies and procedures implemented to address data retention and destruction, however, have presented some serious knock-on consequences.

For example, putting storage limits on individual mailboxes can cause important messages to bounce back to the sender, and matters are only made worse when users delete important messages in an attempt to quickly free up space.

Further, to satisfy archiving and retention responsibilities, outlook files and exchange servers are regularly backed up, creating multiple copies of each message, and unnecessarily contributing to data growth and increased storage costs.

Perhaps worst of all is that volume and storage costs will continue to grow because organisations and their people are fearful of deleting information they may need to access later. Traditional archive and backup records are far too difficult to retrieve for the average user, and when it comes to deciding what can and cannot be destroyed, insecurity and confusion abound.

The decision to destroy data is permanent and complex, and most people do not feel knowledgeable enough to do so confidently, even though Privacy Legislation (including the [Australian Privacy Act](#)) requires the timely de-identification or destruction of records after the retention period.

All of this contributes to the ongoing increase in data growth, and legitimate concerns around storage management practices.

## Collaboration

The last (though certainly not least) major email pain-point that this white paper will address is that of collaboration.

Simply put: email is an old technology, struggling to keep up with the pressures of the modern, collaborative workplace. That's not to say it's not an incredibly powerful tool; it's just that workers are using email in ways in which it was never intended.

Email applications were originally designed as a medium through which one person could send a message to one or more recipients, but "email has evolved to a point where it is now used for multiple purposes: document delivery and archiving; work task delegation; and task tracking. It is also used for storing personal names and addresses, for sending reminders, asking for assistance, scheduling appointments, and for handling technical support queries."<sup>22</sup>

Organisations spend vast amounts of time sending, retrieving, re-sending, forwarding and following up on information that then gets locked away in individual inboxes that no one else can access.

This feeds a highly unproductive cycle where institutional knowledge is continuously being sourced or created, then stored away, and then has to be re-sourced or re-created, because the inherent structure of email makes information inaccessible to anyone but the initial participants.

In modern organisations where teamwork is paramount, where real-time results matter, where clients and customers are shared, where service is provided by multiple points of contact, email becomes a serious limiter on accessibility, openness, responsiveness and workers' ability to collaborate and deliver to their clients.

Dabbish et al. show that workers defer responding to 37% of messages that require a reply,<sup>23</sup> and deferral frequently occurs because further information or assistance from a colleague is required for the response.<sup>24</sup>

To remedy this, a study by McKinsey Global Institute (MGI) recommends "shifting communications among interaction workers from channels designed for one-to-one communication... to social channels which are optimised for many-to-many communication."<sup>25</sup> MGI's research indicates that doing so not only allows messages to be conveyed more rapidly across an organisation, but it also makes those messages searchable and accessible, in real-time, by many people.<sup>26</sup>

MGI's study on the uptake of more collaborative, social technologies points to significant efficiency gains in this respect, including a 25 percent reduction of email use by interaction workers, "freeing up 7 to 8 percent of the workweek for more productive activities."<sup>27</sup>

Additionally, a study by Deloitte found a correlation between digital collaboration and workplace happiness, noting that "workers were 17 percentage points more satisfied with their workplace culture when they had access to digital collaboration tools. Since studies show that employee engagement can be worth as much as 19 percent to the operating income of large enterprises,<sup>28</sup> improving engagement through collaboration could be a relatively simple way of enhancing business performance."<sup>29</sup>

## A Solution for the Modern, Collaborative Office

Imagine a world with an empty inbox; a world where you could spend less time managing your emails and more time on meaningful work; a world where you never needed to hunt for or forward another email again.

### Say Hi to **Charlie**™

How Charlie Addresses the 5 Key Email Pain-Points	
 <b>Filing</b>	<p><b>Charlie Loves Filing</b></p> <p>Charlie is your admin superstar. Before an email even hits your inbox, Charlie has already tagged, filed and stored it away, ready for retrieval should you need it again in the future. Because Charlie automatically connects your email client and CRM, once you've read and actioned a message, you can just hit delete. Experience the beauty of an empty inbox, safe in the knowledge that Charlie has you covered.</p>
 <b>Search &amp; Retrieval</b>	<p><b>Charlie Loves Finding Things</b></p> <p>Charlie is a super sleuth. The days of searching through folders, trying to recall how an email was filed are over. Charlie's powerful search transforms the way you look for and find emails, making the process quick, intuitive, and reactive to your needs. With fully-customisable tags and broad capability to search metadata, you'll find exactly what you're looking for and have confidence that you're seeing the full picture - regardless of how an email has been filed.</p>
 <b>Archive &amp; Destruction</b>	<p><b>Charlie Loves Archiving</b></p> <p>Charlie digs laborious admin tasks and is your governance guru. As a living archive, Charlie makes sure you've got the information you need, on hand, when you need it. Whether it's for an audit, a complaint or any other matter, Charlie is your go-to. And with customisable rules for retention and destruction processes, you'll never lift a finger managing your compliance and privacy requirements again.</p>
 <b>Collaboration</b>	<p><b>Charlie Loves Collaboration</b></p> <p>Charlie keeps you in the loop. It knows the traditional 1-to-1 nature of email locks away valuable information and kills opportunities for collaboration in the workplace. With Charlie, your organisation has a single-source-of-truth that allows your people to freely access the information they need, when they need it. All of a sudden, email is inclusive, unified and truly collaborative.</p>
 <b>Volume</b>	<p>Whilst we can't change the number of emails you receive, by dealing with the above issues, Charlie sure helps minimise the pain.</p>

## Who Can Charlie<sup>™</sup> Help?

Issue	Employees	Organisations	
		Productivity	Governance
 Filing	●●	●●	●●
 Search & Retrieval	●●	●●	●●
 Archive & Destruction	-	-	●●
 Collaboration	●●	●●	●●
 Volume	●●	●●	-

## Financial Benefits for Businesses Using Charlie<sup>™</sup>

It's simple. From a pure efficiency perspective, Charlie<sup>™</sup> pays for itself if it saves the average Australian Employee 1¼ minutes per day.<sup>30</sup>

## Conclusion

If we're ever going to unlock the potential for email in the modern, collaborative business, we need to re-think our subservient and unproductive relationship with our inboxes.

Stripping out inefficiency and developing alternatives to low-value work (like filing, and searching for/following up on information), not only makes good financial sense, it clears one of the biggest barriers to innovation and further value creation: time.

How organisations choose to capitalise on these time savings and 'capture value' varies widely from sector to sector, and business to business. There is, however, no doubt that freeing up an extra 13 minutes (or 1.2 weeks per employee, per year) in filing alone presents tremendous opportunities to unlock additional value and drive further productivity initiatives.

Beyond corporate and individual efficiency (and by extension, financial performance), adopting solutions which assist knowledge workers to better manage their steadily-growing inboxes and more readily collaborate with their peers also produces profound impacts on workforce engagement, employee satisfaction and ultimately, client/customer service outcomes.

Organisations that provide key decision makers with access to real-time data are also able to pro-actively manage their regulatory obligations and minimise costly and protracted legal disputes. Additionally, archiving email not only preserves enormous stores of IP and protects corporate data in a secure and tamper-proof environment, it also allows organisations to tap into this incredible resource and draw out invaluable business insights that give them a truly competitive advantage.

With worldwide email usage rapidly increasing year on year, and 'value' shifting quickly in the modern workplace, the pain-points of email are not to be ignored. They're not getting better on their own and aren't going away any time soon. So, it's time to face the facts: email isn't working. It may not be broken, but the way we currently use it certainly is. It's time to make the change and solve email for the modern business.

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