

EXECUTIVE SUMMARY

The Complete Practical Guide to Effective and Efficient E-mail Management

By Dr Tom Jackson

Since the inception of e-mail communication in 1971 the volume of e-mail has rapidly grown to an estimated 96 billion e-mail messages a day. Employees are increasingly finding it difficult to cope with the ever increasing number of e-mails. In a recent survey, 53 per cent of employees said they receive more e-mail than they can handle, which shows an increasing awareness of the e-mail problem. The data from the survey also revealed that the majority of employees are sending and receiving over 100 e-mails a day. With many employees dealing with so many e-mails a day they are likely to be suffering from e-mail overload, as the majority process incoming e-mail in a far from efficient and effective manner. The net effect is that e-mail communication is costing organisations millions in lost time and reduced productivity.

An example of the costs involved can be taken from a recent study of one of the world's largest banks that implemented the step-by-step approach detailed in this report. By just taking a small sub-section of the bank (100 employees) it was found that they were receiving on average 115 e-mails a day. The cost to the organisation for 100 employees just to read the e-mails is £5.5 million a year. This figure has been significantly reduced by fully understanding the nature of the e-mail the employees were receiving. By removing the non-actionable e-mail (98 e-mails a day) to another medium has saved the bank 78,333 person hours a year (£4.7 million). However, a small portion of this time is now spent reading the information that used to be sent via e-mail in a different medium. This is just one example from one area of e-mail communication that can provide massive savings.

Without doubt the cost of running an e-mail communication system for an organisation is steadily growing and employees are becoming less efficient and effective. Many think of an e-mail communication system as just the computer and e-mail application. However, it is much more than that and includes such factors as, employee effectiveness, the organisation being legally compliant and safe guarding against liability, protection against e-mail viruses both internally and externally, and managing the infrastructure of software and servers. To ensure the organisation has a healthy and optimum e-mail communication system this report covers three key areas that if addressed will provide substantial savings, improve employee efficiency and effectiveness, and help prevent against legislative action being taken against the organisation. These are:

- Employee - improving their e-mail efficiency and effectiveness
- Employer – ensuring they meet e-mail regulation, retention and legislation
- Infrastructure – disaster recovery, outsourcing, software, space management

To date there have been a number of reports and books on how to manage e-mail. They normally contain high level issues regarding e-mail, like too much e-mail is a problem for employees, but usually fall short in providing a step-by-step guide on how to tackle the big issues. Previous reports have provided high level solutions, but are not detailed enough to implement and make a real difference to an organisation. This report provides a phase and stage approach, as shown by Figure 1.1. There are four phases and nine stages that are needed to achieve long lasting e-mail optimisation within an organisation. It also provides mechanisms to enable this to happen in the form of an e-mail optimisation toolkit that contains:

- a comprehensive e-mail policy structure to aid writing and testing existing e-mail policies (chapter 3)
- a tried and tested questionnaire for the assessment of the e-mail landscape within the organisation (chapter four and appendix one)
- a structure for an e-mail infrastructure audit (chapter four)
- a diagnostic tool for quick and easy analysis of the results (chapter five and appendix two)
- a strategy matrix to determine how each e-mail issue will be addressed (chapter six)
- a feature analysis matrix to assess existing and new applications / hardware (chapter seven)

- a proven e-mail training programme (appendix three)
- a formulae that provides the cost of e-mail communication (chapter seven)

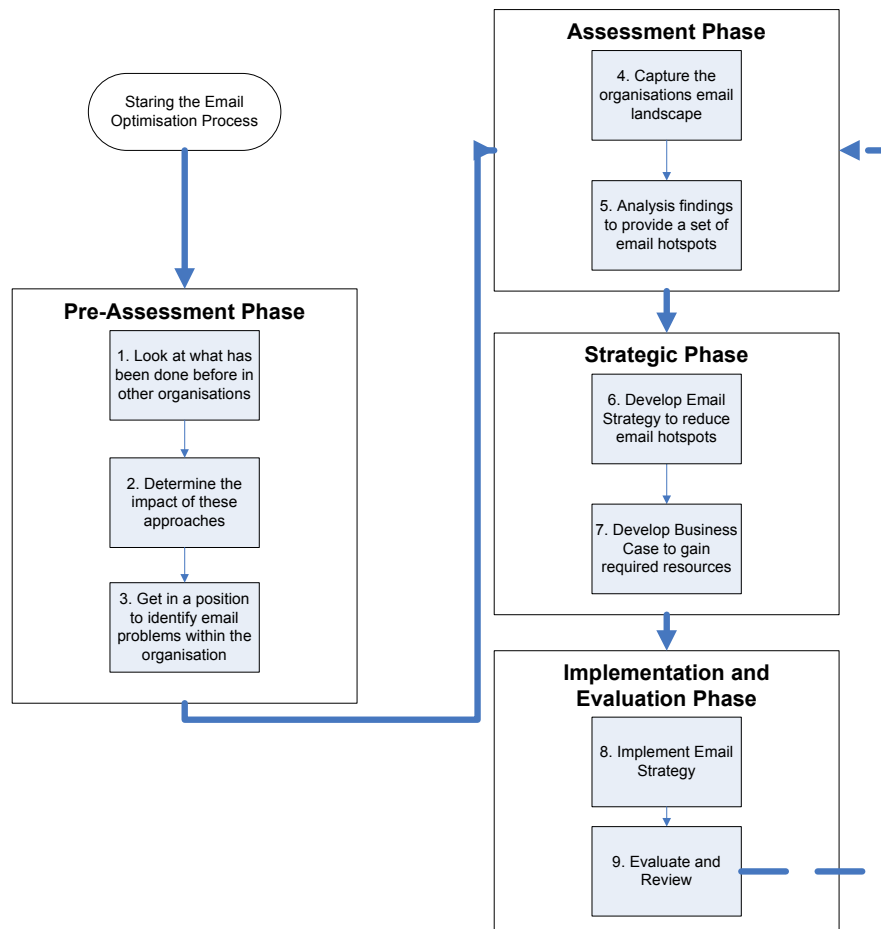


Figure 1.1 – The Phase and Stage approach to achieving e-mail optimisation

Chapter Two of the report tackles the Pre-Assessment Phase and looks at the size of the e-mail problem and the challenges that face both employees and employers. It details what approaches organisations have tried in the past and the impact they have had, as well as highlighting the known e-mail defects that need to be addressed. It also discusses and provides examples for the need of an enforceable e-mail policy, the cost of disaster recovery and the issues relating to e-mail retention, regulation and legislation. Chapter Three concludes the Pre-Assessment Phase and provides a comprehensive e-mail policy structure to aid writing and testing existing e-mail policies and some examples of the benefits of having one in place.

Chapter Four and Five cover the Assessment Phase. Chapter Four discusses the need to assess the e-mail landscape and provides a tried and tested questionnaire that has been used in many multi-international organisations. It goes on to outline a structure for an e-mail infrastructure audit to review the cost of software, archiving, security and continuity. Chapter Five provides a diagnostic tool that will enable a quick and easy analysis of the results to be completed. The chapter also contains the results of the questionnaire from one of the world's largest banks.

Once the result is known Chapter Six moves on to the Strategic Phase and provides potential solutions to the results gained from the questionnaire analysis. A strategy matrix is used to determine how each e-mail issue will be addressed. In order for the strategy to be implemented Chapter Seven concludes the Strategic Phase by detailing how a tangible business case can be made to gain support and resources to implement the newly formed e-mail strategy. An e-mail costing formulae is provided to determine the cost of running an e-

mail communication system. The feature analysis matrix is introduced to aid in the assessment of existing and new applications and hardware to help optimise the e-mail communication system.

Chapter Eight, relating to the Implementation and Evaluation Phase, details how the e-mail strategy should be implemented and evaluated with an example of a proven e-mail training programme that has been deployed at many multi-international organisations. The report concludes with Chapter Nine that reviews ways to further maximise the content of e-mail messages and how this can further optimise employee performance.

Through the use of case studies, academic research, real life examples, and the introduction of the e-mail optimisation toolkit, the report provides a detailed holistic approach to how an organisation can regain control of their e-mail system. This will then enable their employees to become more efficient and effective, saving the organisation money, and for the organisation to gain control of e-mail retention, regulation and legislation.