



THE DEFINITIVE GUIDE TO EMAIL MANAGEMENT for Small Law Firms

netdocuments®

Contents

- WHAT IS EMAIL MANAGEMENT AND WHY DOES IT MATTER?.....3**
 - Why Small Firms Are Increasingly Implementing Email Management Systems...3
- CHOOSING THE RIGHT EMS.....4**
 - Improves Efficiency and Enhances Productivity.....4
 - Enables Centralized Access.....5
 - Supports Firm Growth.....6
 - Helps Keep You Compliant.....7
- HOW TO IMPLEMENT AN EMAIL MANAGEMENT SOLUTION.....7**
 - Involve Key Team Members.....7
 - Communicate Changes Early.....8
 - Share the Benefits.....8
 - Host Training Sessions.....8
 - Find and Designate Superusers.....8
 - Test and Optimize.....9
 - Use Customer Support.....9
- CONCLUSION.....9**
- ABOUT NETDOCUMENTS.....10**
- SOURCES.....11**

WHAT IS EMAIL MANAGEMENT AND WHY DOES IT MATTER?

Research and experience have shown us that emails are distracting. According to McKinsey Global Institute, the average worker spends an estimated 28% of their workweek managing email and nearly 20% looking for internal information or tracking down colleagues who can help with specific tasks.¹ It's clear that companies are losing out on massive amounts of employee focus and productivity.

STAT:
Email fatigue
could lead 38% of
workers to quit
their jobs.³

Especially in the context of a law firm, emails represent important matter communications and documents that need to be read, digested, filed, and secured — which is why many lawyers anecdotally “live out of their inbox” — often cobbling together filing systems to use as running task lists, file storage, and more.

Researchers have found that when companies implement a central, searchable tool for communication, it can reduce as much as 35% of the time employees spend searching for information.² This is where email management systems can help.

Why Small Firms Are Increasingly Implementing Email Management Systems

As a solo practitioner or small firm, you're understandably focused on growing the business, and email management may be easily overlooked. But for law firms, improper management of emails can be devastating if you ever experience a data breach or malpractice lawsuit.

All firms must implement organization-wide policies and procedures for handling email communications following the American Bar Association's (ABA) ethical standards. A great place to start is by 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.)**

Effective email management for your growing law firm involves the systematic control of all email communications within the organization in order to mitigate the risk of compliance issues or a data breach.

Email management systems (EMSs) 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 firm's sensitive data.

CHOOSING THE RIGHT EMS

While some organizations wait until catastrophe strikes before adopting an EMS, success often lies in being proactive, not reactive. An effective EMS not only improves your team’s productivity, it can also enhance your client’s experience.

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

PRODUCTIVITY	CENTRALIZED ACCESS	SCALABILITY	SECURITY
EMS tools built for your profession should integrate directly with the software you use daily, cutting down on time spent switching between systems.	A single reliable cloud service comes with 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 headaches in the future.	Client records are the lifeblood of your business and an EMS purpose-built for the legal industry can help ensure you have the right security and compliance measures in place.

Below is additional information about each of these areas.

Improves Efficiency and Enhances Productivity

Implementing a new technology for your business is no small task, so it needs to provide a big impact.

Beyond built-in organization and the ability to quickly and accurately file an email and attachments into your client records, look for an EMS to continue improving internal processes and cut back on manual, repetitive efforts, giving valuable time back to employees and leaving less room for errors.

A powerful EMS should have the following capabilities:

ANYWHERE ACCESS

Enable your teams to work effectively from anywhere, on any device with an EMS that allows you to easily access, file, and search emails and related records, regardless of internet connection.

AUTOMATED WORKFLOWS

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

TIP:

The ability to quickly file communications into the correct matter file without ever leaving your inbox saves time and helps protect your firm and ensure you’re in compliance with ethical policies prescribed by the ABA.

INTEGRATIONS

An EMS should seamlessly integrate with the applications your team is already using, eliminating silos and increasing collaboration by connecting essential tools.

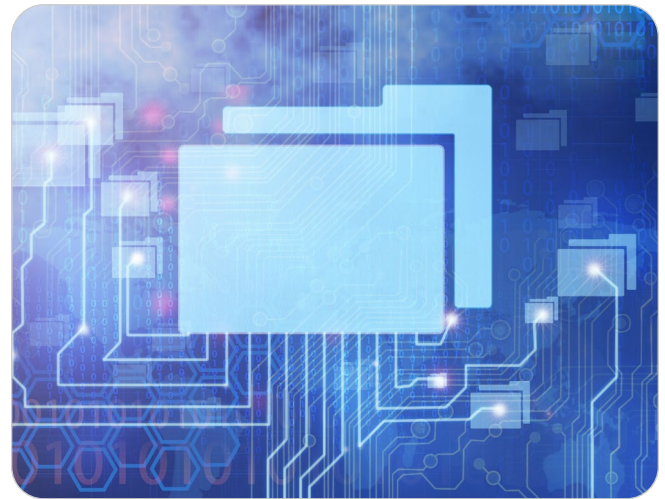
CONVERSATION FILING

Emails often turn into long threads and filing each reply separately can quickly become redundant. Conversation filing allows you to file an email once and then subsequent emails automatically get filed in the same location.

Enables Centralized Access

The ABA's *TECHREPORT 2021 Survey* reports that cloud service use is highest among small law firms at 66%.⁴ However, that still leaves a large portion of professionals without (or unaware of) the benefits of cloud-based offerings.

When asked about their biggest concerns about the cloud, 61% of lawyers cited “confidentiality/security,”⁵ yet 94% of businesses report an improvement in security after switching to the cloud.⁶



While there might be some skeptics remaining, a cloud-hosted EMS not only provides anywhere-access — making it possible for teams to work on any device, whether in the office, while traveling, in the courtroom, or at home — it also leads to faster delivery of services and an overall better client (and employee) experience.

A SINGLE SYSTEM OF RECORD

With a cloud-based EMS that connects with your other foundational technologies, you can eliminate data silos and have a trusted source for the most relevant, accurate information.

FASTER PROCESSING

Cloud solutions can 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. This helps keep applications running smoothly.

COST SAVINGS

When implementing a cloud service, small and midsize law firms can experience reduced spending on hardware, storage, networking, and security and reductions in operational, maintenance, and upgrade costs. Every minute of system availability and increased productivity from simplified workflows adds to your bottom line.

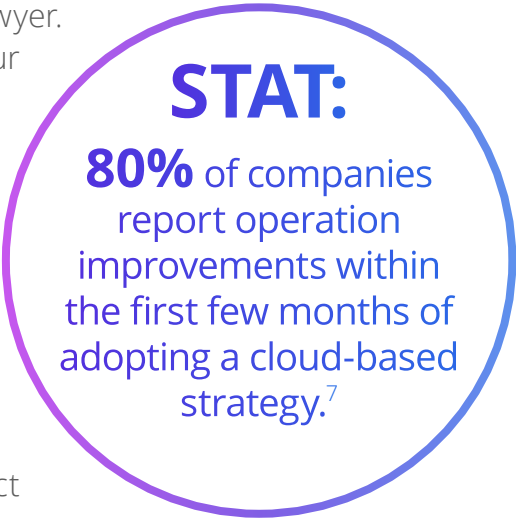
Supports Firm Growth

As you grow, an effective EMS will be able to adjust with you and can become a competitive advantage.

ONBOARDING NEW LAWYERS

Consider the time typically required for onboarding a new lawyer. How long does it take them to understand the status of your matters or projects before starting to contribute? If talent leaves the firm, can another lawyer step in quickly?

An EMS can shorten the time it takes for new lawyers to become acquainted with your caseload because each communication and attachment is connected to the client file with intelligent insights on access and usage, surfacing highly relevant materials. This means new lawyers can pick up where others left off and provide the same level of professionalism and care your clients have come to expect from you.



When dealing with new members to the team, 69% of employees are more likely to stay with a company for three years if they experienced great onboarding.⁸ Technology that's seamless and easy to adopt can help enable the positive work experiences today's professionals desire and expect.

TECHNICAL CONSIDERATIONS

There are a number of ways an EMS can help support the growth of your business from a technical standpoint. Consider these factors as you explore EMS options:

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 the advanced collaboration and workflow capabilities your teams need as your services scale to support new clients.

Helps Keep You Compliant

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

INHERITED SECURITY

A significant benefit for users of cloud platforms is “inheriting” the security and compliance controls the cloud provider has implemented within its infrastructure. Look for a service provider that can validate the security of its services architecture by having its compliance controls independently audited and certified, and that makes their security credentials available to customers on demand.

SEAMLESS PROTECTION

When your EMS allows teams to quickly file every communication and attached document directly into a client’s secure matter file without ever leaving their email, you make it easy for everyone to help keep your data safe and in compliance with client demands and regulatory requirements.

HOW TO IMPLEMENT AN EMAIL MANAGEMENT SERVICE IN YOUR FIRM

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

1. **Involve key team members in the decision**
2. **Communicate changes early and often**
3. **Share the benefits**
4. **Host training sessions**
5. **Find and designate superusers**
6. **Test and optimize**
7. **Use customer support**

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

1. INVOLVE KEY TEAM MEMBERS IN THE DECISION. Ensure that the change of technology will benefit most users and that the technology will have a meaningful impact on your team’s day-to-day workflow.

A common mistake when considering a technology decision that will affect the entire organization 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 and consider their concerns.



2. COMMUNICATE CHANGES EARLY AND OFTEN. 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.

3. SHARE THE BENEFITS. Take time to walk employees through why this change is coming and how the new system will benefit them in their daily workflow.

Your team wants efficiency and simplicity. Identify what features and uses will resonate most with your audiences to get people looking forward to having a better solution in place.

4. HOST TRAINING SESSIONS. As you build up to the implementation, you might want to schedule demos and training sessions to help prepare people for the transition. 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 information where there are knowledge gaps. 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 desks and enjoy a meal while going through the new training.

5. FIND AND DESIGNATE SUPERUSERS. Seek out influential leadership and staff who can help promote the benefits of your new EMS and individuals who can assist if users have basic questions. With a strong coalition of supporters, you'll see higher adoption rates.

TIP:

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

6. TEST AND OPTIMIZE. Choosing and implementing an EMS 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. USE CUSTOMER SUPPORT. Another key consideration when choosing an EMS is whether the service provider 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 resolve an issue. You don't want long delays or anyone feeling stuck. As much as you try to equip the team with the best steps, there could be bumps along the way, and you'll want reliable customer support.

CONCLUSION

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

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 more time to devote to delivering world-class client services.



ABOUT NETDOCUMENTS

NetDocuments is the world's #1 trusted cloud-based content management and productivity platform that helps legal professionals do their best work. Backed by over 20 years of experience in cloud innovation, NetDocuments supports 3,500+ law firms, corporate legal departments, and public sector entities with solutions that drive better user experiences and business outcomes. NetDocuments offers a complete end-to-end platform for document and email organization and management, including award-winning security and research capabilities, robust collaboration and search technologies, seamless integrations with other tools professionals use daily, and much more. [Learn more about NetDocuments.](#)



Spend less time on administrative tasks and more time focused on clients (and billable hours) with one-click email management that automates workflows and helps build complete work files.



Minimize and eliminate manual, tedious tasks with the ability to plan out a document set, add files as they're completed, and then quickly compile sets into digital PDFs for client delivery.

POWERFUL EMAIL MANAGEMENT IS WITHIN YOUR REACH.

Schedule a demo for ndMail from NetDocuments today.

netdocuments.com/demo

SOURCES

1. McKinsey Global Institute: [The social economy: Unlocking value and productivity through social technologies](#)
2. McKinsey Global Institute: [The social economy: Unlocking value and productivity through social technologies](#)
3. Forbes: [Survey Finds Email Fatigue Could Lead 38% Of Workers To Quit Their Jobs](#)
4. American Bar Association: [TECHREPORT 2021: Cloud Computing](#)
5. American Bar Association: [TECHREPORT 2021: Cloud Computing](#)
6. Salesforce: [12 Benefits of Cloud Computing](#)
7. TechJury: [37 Heavenly Cloud Computing Statistics for 2022](#)
8. 8. SHRM: [Don't Underestimate the Importance of Good Onboarding](#)