EMAIL IS A DOCUMENT, WHY DON'T WE TREAT IT AS SUCH?
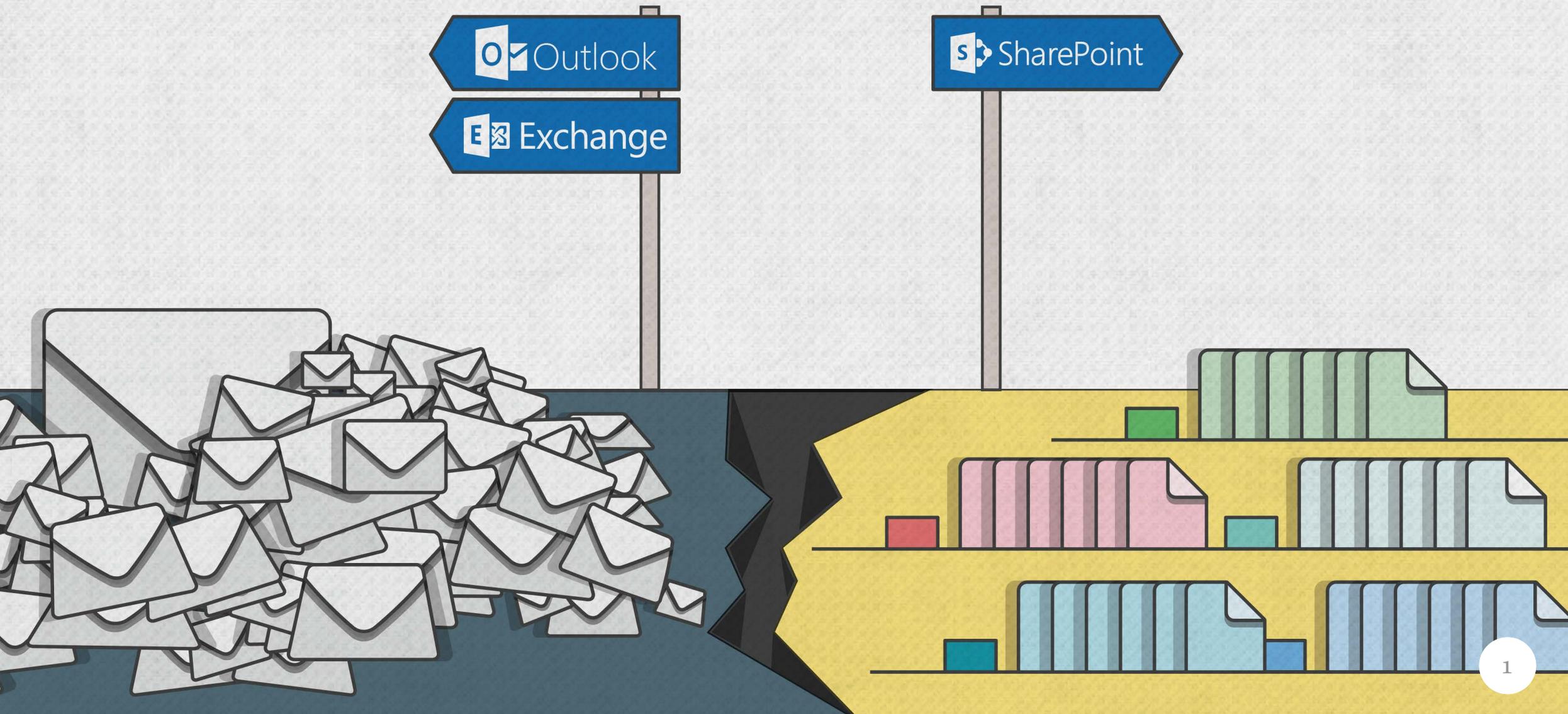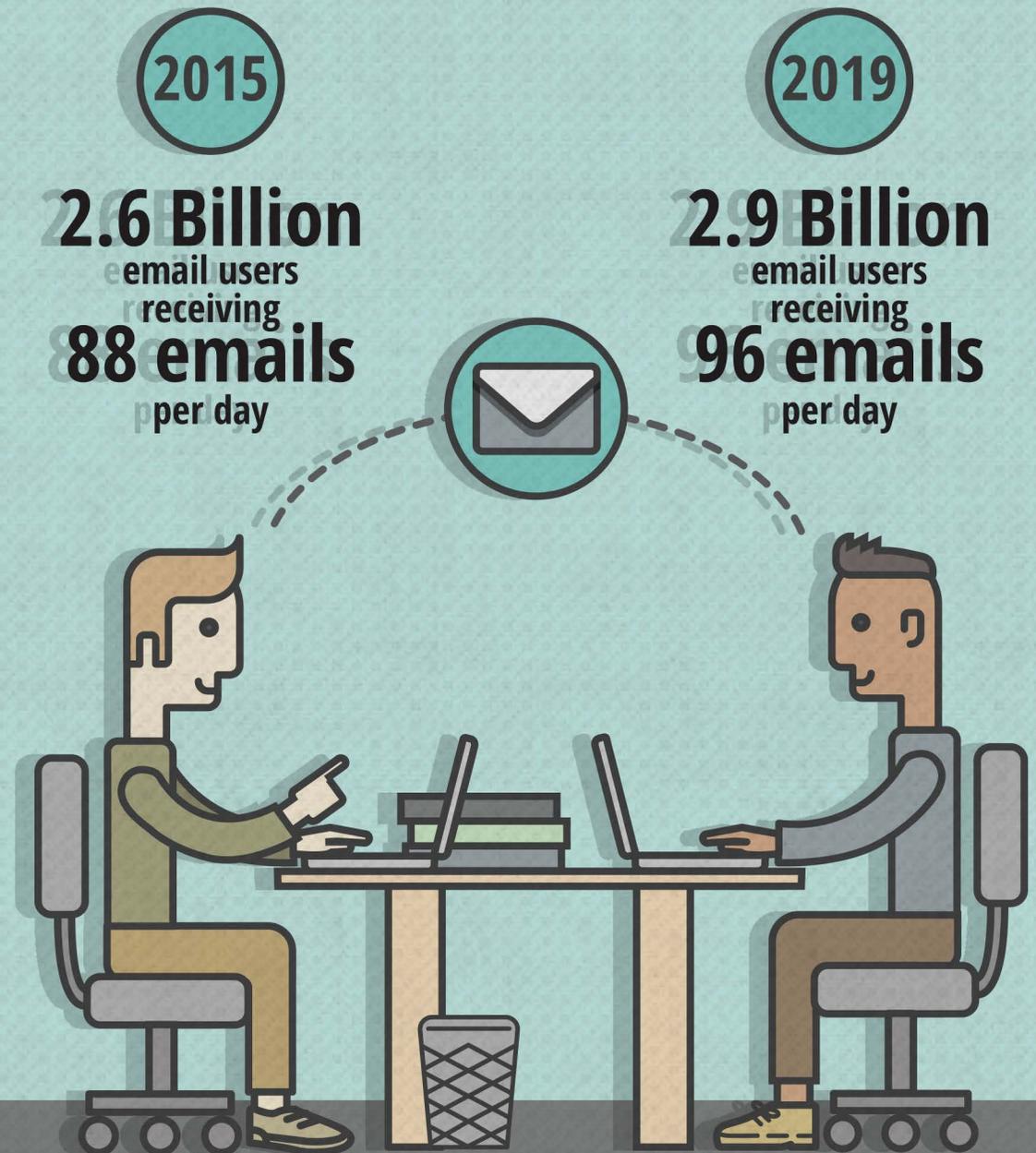
Email and the modern world

Pre-dating the Internet and contributing significantly to its development, email is widely considered to be one of, if not the, most important communication tools ever invented. Radicati - the technology research firm - reports that the average business user receives 88 emails per day, a number that is expected to keep growing.

However, despite its global dominance, email faces challenges around information overload and the way emails are currently stored and managed.

All too often, emails are automatically stored in silos, separate from other document types. As a result, corporate users waste time, energy and productivity hunting through crowded inboxes for crucial files. New technology should help these users work more efficiently, yet too often it under-delivers.

This eBook will explore some of the challenges of email, and expand on how corporate users can engage technology to reduce the friction created by poor email management.

2015
2.6 Billion
email users receiving
88 emails
per day

2019
2.9 Billion
email users receiving
96 emails
per day

What's wrong with email management today?

In the vast majority of organizations, email remains the primary method of exchanging unstructured information with colleagues, partners and customers. It is widely used for:

- Exchanging messages
- Professional correspondence
- Delegating and managing tasks
- Sharing documents
- Requesting and managing work orders

Before the widespread adoption of email, all of a company's paper correspondence, memos and documents would be stored within paper archives. Typically, all documents, letters, minutes and other paperwork relating to a particular project, case or division of the business would be physically held together within a folder. This allowed organizations to rapidly find all relevant information and let them conform to regulatory and compliance standards.

Over the past thirty years, most companies have replaced paper archives with electronic document management systems such as SharePoint, which is used in 80% of Fortune 500 companies. However, for technological reasons, email has been stored separately in email systems, leading to a fragmentation in the way organizations handle their information. For companies that store their documents by case or theme, this dichotomy in information management has led to confusion and incoherence.
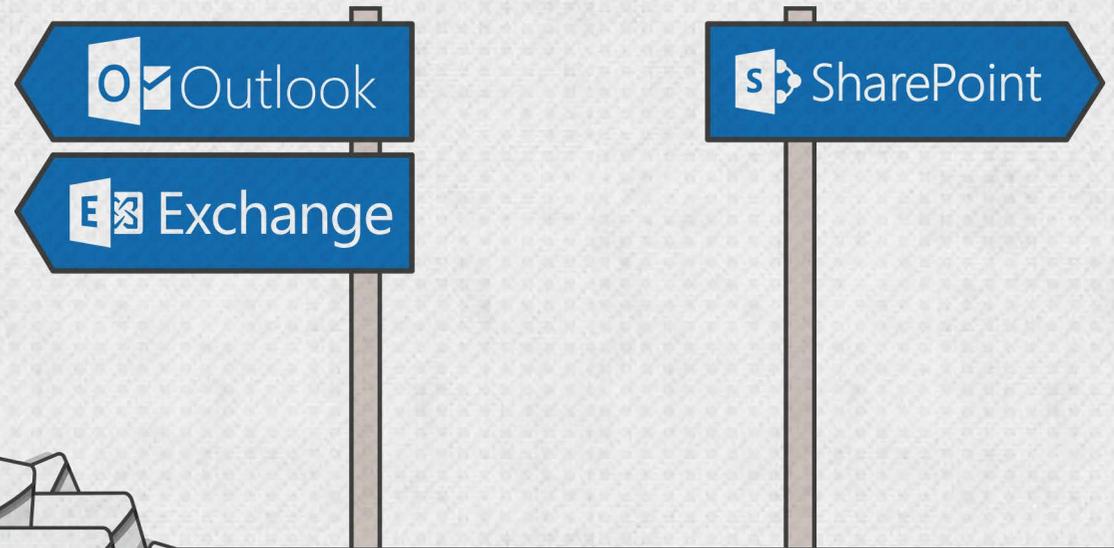
Why do companies separate email from other documents?

All the world's most popular office productivity and collaboration platforms such as Microsoft, Google, and IBM separate email from other kinds of documents. An enormous range of file types – word processing documents, spreadsheets, PDFs, images and more are managed efficiently within these document management systems, yet emails are consistently excluded.

Documents are tagged with increasingly sophisticated metadata to help users find them, and in Office 365 this is even added automatically.

Email messages, by contrast, are stored haphazardly within user email inboxes. Hard to find, with no associated metadata and at risk of permanent deletion for a variety of reasons (an employee leaves the organization, email inboxes overflow, inadvertent archiving mistakes, etc.), emails receive almost no consistent attention – even though they often contain incredibly important information.

Why are emails treated differently from other documents?

Email existed prior to any other modern 'electronic' documents. As a result, it is perceived as a different type of artifact and is therefore handled within different IT silos.

Emails have different structure and format compared to other documents.

Email was historically seen as less 'official' than letters or signed documents.

Outlook

Exchange

When email is handled separately

The separation of email from other documents has clear historical roots. However, today there is no fundamental reason why emails should be stored and managed separately. The continued practice of treating emails differently from other documents is counter-productive.

It is hard to find emails, which is time-critical when they contain crucial information.

When the only proof of a transaction or agreement is contained in an email, retrieving it for compliance or regulatory purposes can become time consuming, especially if the message has been archived.

If a team is working on a project but needs to check one piece of correspondence held in an absent member's inbox, they cannot do their work.

Even the best search engines cannot produce results from inboxes and document repositories without extensive and complicated customization. This makes finding required information unnecessarily time-consuming.

Business is being hindered by poor handling of important emails.
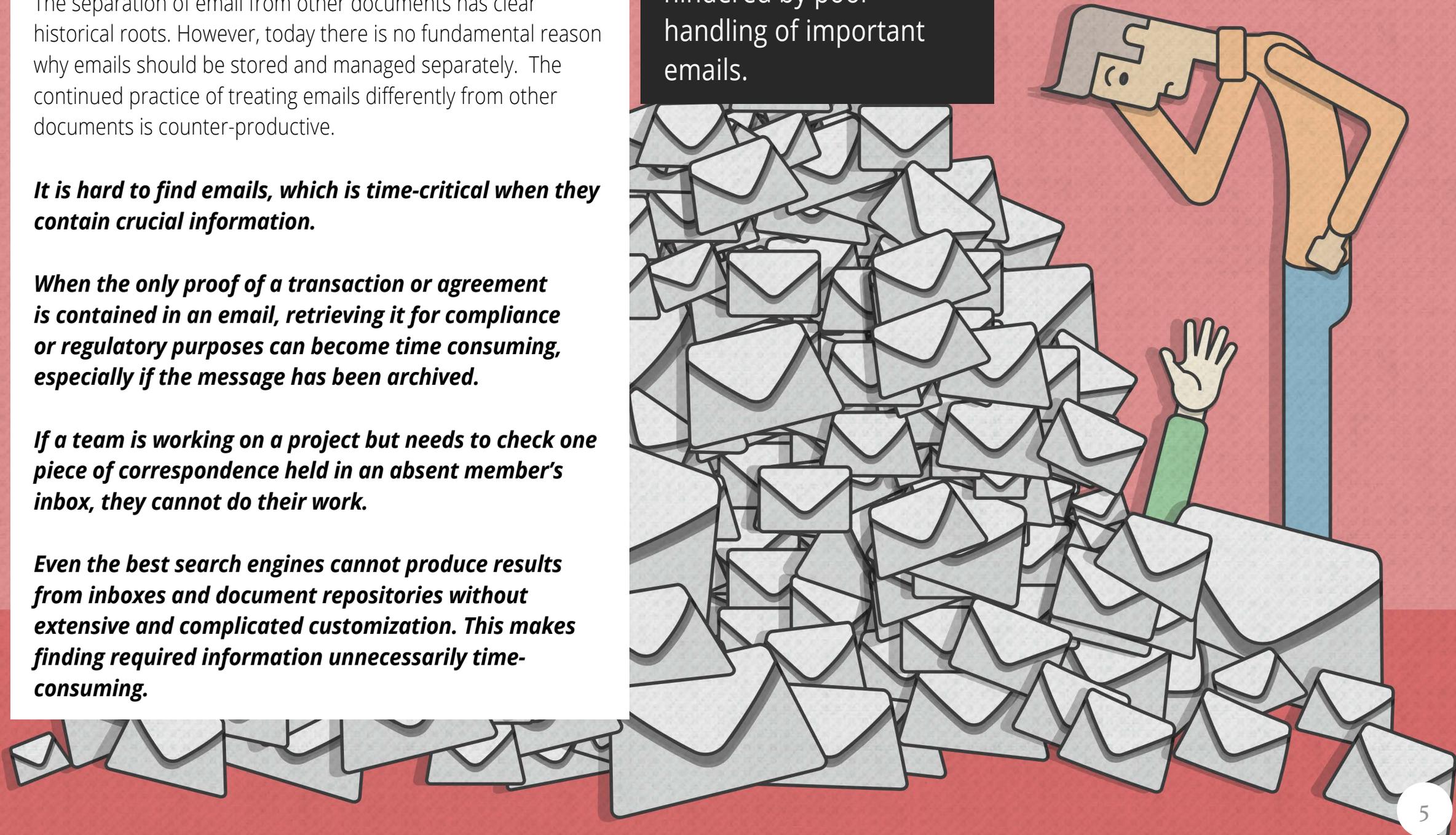
Employees see email like they see any other document

For too long, document management environments – from the humble 'C: drive' to the most advanced cloud-based platforms, have forced users to keep emails and other documents in two different places. This doesn't make sense, since employees use email just like any other document, as illustrated by the following examples.

Throughout any project, workers depend on a variety of tools to complete their tasks. Proposals may be written in MS Word, Excel Spreadsheets are used to plan project stages and email is used to action tasks and delegate responsibilities. While proposals and spreadsheets are stored in a common folder that all project members can see, emails by contrast, are stored apart only accessible to the individuals who sent or received them.

This situation presents obstacles to smooth collaboration. For example, it is possible for a team member to view project progress on a spreadsheet because it is stored in a shared space, or to find specific files by narrowing a search using document metadata. These methods, however, do not work for email.

6

Work orders

Businesses regularly make work requests, as well as invoicing and payment requests via email – especially once a close working relationship has developed. Smaller companies in particular are doing away with 'official' work orders altogether. Because, once a business feels it can trust a supplier, why go through the extra hassle of completing work orders and contracts at each stage? Email is so easy, yet when a business needs to submit its accounts and payment records they will once again be stung by the fact that their emails are kept separate from other documents.

Work orders represent just one way that email is used for official business – contracts, proposals, SOWs and other paperwork are similarly transmitted via email.

It is clear that business users view email like other types of documents; it just makes sense to store the two in the same place.

Since users work with email and other documents in a similar fashion, they should be able to store them in the same place.

A new approach to email is needed

As this eBook has shown, the traditional approach of separating email and other documents no longer works. Whether it is for knowledge retention, compliance, records management, or audit or discovery purposes, corporate users need to manage emails the same way they manage other documents.

Like any other documents, emails go through drafts and revisions, so they should employ metadata. Colleagues should be able to find correspondence using the same method they use for other document types.

What can be done to improve the situation?

To become more productive, corporate users should:

- Stop thinking of emails and documents as separate items.

- Store emails of record together with other documents.

- Define version control, metadata terms, and compliance rules for email, not just documents.

- Talk to users and co-workers about how they actually work day to day, and ensure actual systems reflect this work method.
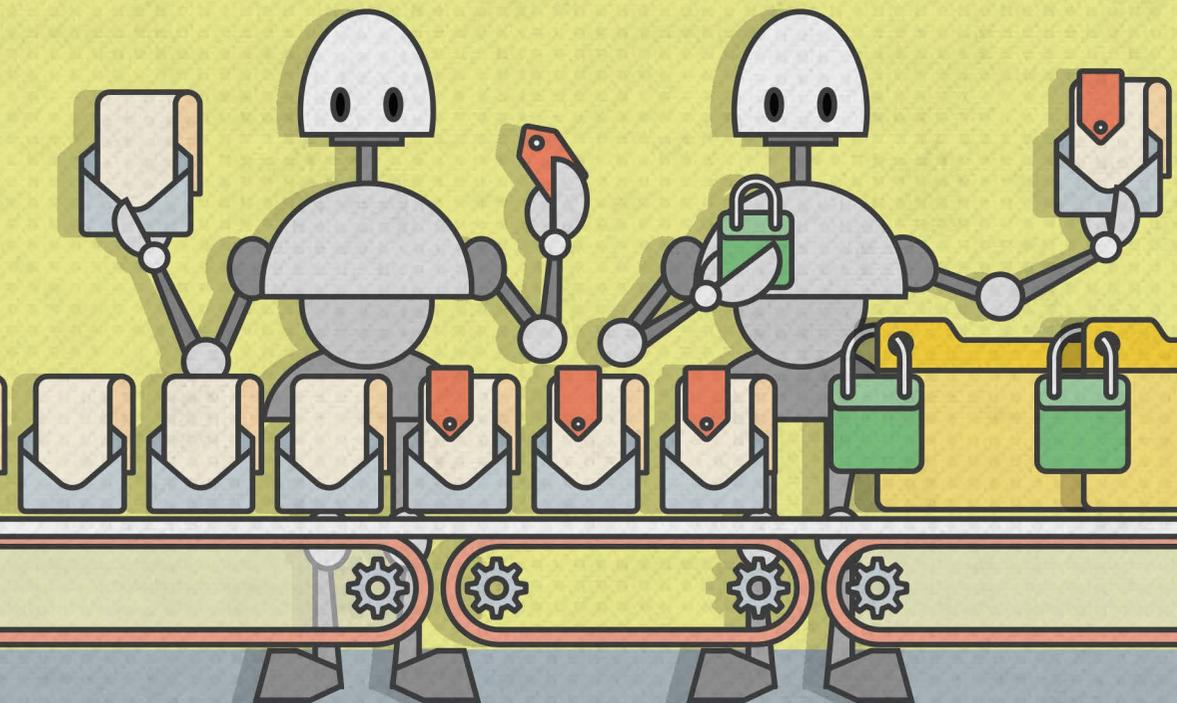
harmon.ie®

harmon.ie helps companies address the challenge of saving emails in SharePoint by providing a streamlined user experience for business users, helping them do the right thing.

harmon.ie is an email sidebar that is easily installed within the Outlook email window. The email sidebar gives direct access to the corporate SharePoint environment, letting workers drag and drop individual emails directly into their SharePoint environment so they can easily be found later on. Uploading emails is also available from Outlook on mobile devices.

Developing a new strategy for handling emails as documents may require some upfront resources, yet in the long run it enables the success of business initiatives, it saves employees' time and it lets them focus on core roles. Companies with a unified approach to email and document management become more productive, competent and competitive.

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