



**A GUIDE TO
INTELLIGENT EMAIL
MANAGEMENT
IN PROFESSIONAL
SERVICES**

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EMAIL IS AT THE HEART OF PROFESSIONAL SERVICES

Email is key to the modern enterprise, but perhaps in no industry quite like professional services. For workers at accountancy firms, financial advisors, advertising firms, healthcare services firms, IT consultancies, and the like, email is the center of their day.

Interacting with clients is carried out by email, and important documents, such as contracts or invoices, are sent and received by email too. Enormous streams of emails come in and out of an organization every day – handling them effectively can be problematic.

Despite the large amount of important emails, there's an even larger amount of emails that need to be discarded. Separating what needs to be kept and what doesn't, is a big challenge. Managing the important emails on an ongoing basis is a further challenge which requires an intelligent solution.





DID YOU KNOW?

- Professional services organizations require the ability to save emails in a central repository, along with all other documents of record.
- And while, typically, only 5%¹ of business emails are documents of record...
- Yet, 80% of important records in an organization are emails². These correspondences must be documented and recorded, so they can be found later when required.
- Knowledge workers need a helping hand storing and classifying emails.

STEP 1

A comprehensive, easy-to-use email management system must be put in place that ensures workers can identify, classify, and store important emails and document attachments, and find them later when needed.

STEP 2

The latest in artificial intelligence must be leveraged to provide intelligent email management functionality. harmon.ie uses AI to do a lot of the hard work for knowledge workers, allowing them to focus on core work, not on email management.

¹ RIMtech. 2016. The Role of Email in RIM Compliance. Available online: <https://pages.harmon.ie/information-governance-EN-wpaper-registration.html>

² RIMtech. 2016. The Role of Email in RIM Compliance. Available online: <https://pages.harmon.ie/information-governance-EN-wpaper-registration.html>

A woman with long dark hair and glasses is smiling and looking towards a man on the left. They are in a meeting around a table with a laptop, coffee cups, and papers. The image has a blue overlay.

**"IN THIS EBOOK WE WILL EXPLAIN
HOW OUTLOOK, SHAREPOINT - WITH
A LITTLE HELP FROM HARMON.IE
- REPRESENTS THE MOST VIABLE
OPTION FOR A PROFESSIONAL
SERVICES COMPANY'S EMAIL
MANAGEMENT STRATEGY."**

WHEN EMAIL MANAGEMENT BREAKS DOWN

The problem facing professional services organizations is that client information and knowledge contained in emails needs to be consistently stored in the right place and classified correctly, so that it is always accessible to anyone who works with that client. If not, then client work will grind to a halt.

However, email management is often not as easy as it should – and could – be. Emails are documents of record and need to be treated as such. But many email management solutions do not make this possible.

Take Microsoft solutions, for instance. Many organizations that invest in Microsoft technology end up with a gap between email and other records. Documents are stored in SharePoint, while emails are stored in Exchange via Outlook. Using this setup, emails often become siloed in personal inboxes. Essential documents of record, therefore, remain inaccessible to the wider organization. The risk is that employees, when they need to pick up work on a client, for instance, cannot find the information they need.

Here we look at a few scenarios that highlight the specific problems professional services face.





SCENARIO ONE: PREVENTING SILOS

An employee at Acorn Accountants, Gianna, has gone on vacation. A client needs an important issue remedied immediately, and so the work is picked up by one of Gianna's colleagues. Unfortunately, an email with critical information is siloed away in Gianna's inbox and the problem cannot be solved. There needs to be a mechanism so that records are always accessible to colleagues.

Similarly, when an employee leaves the organization, there is a risk that knowledge can be lost in their inbox. As it is not uncommon for professional services companies to have a high employee turnover, storing and maintaining this knowledge for future use is essential.

Also, if a customer messages a group mailbox, the employee who picks up the case must be able to access all previous correspondences. If these are not available in a central repository, it will be hard to provide the level of service that customers expect.



SCENARIO TWO: CUSTOMER CORRESPONDENCES

An employee at a financial services company is communicating with a client. The client has indicated that they would like to invest in a fund and is asking for professional advice on the risks involved. The employee offers this advice and records it in a document, sending the advice to the customer in an email attachment. All correspondences with customers must be documented and stored so that the company has an accurate record of customer history.

What's more, it is likely that multiple people will be working with the client at any given time. Everyone needs to be able to access the correspondence history so that they can pick up where the work has been left off.



SCENARIO THREE: STAYING COMPLIANT

Professional services companies need to stay compliant with a wide range of internal or industry-specific standards. Employees must be able to easily save emails in the right place, so that they can be found quickly if an audit or review takes place at a later date.

DO THE RIGHT THING

For emails to be treated as the documents of record that they are, organizations need a single place within which to save all records. If a customer contract needs to be resurfaced, it should be quick and easy to discover. This means using SharePoint for both emails and other records by providing a central repository for emails and documents.

WHY SHAREPOINT IS THE MOST VIABLE OPTION

Using SharePoint, you can upload emails of record as well as documents to the platform, so that everything is stored in one location.

Weighing the pros and cons:

PROS

- All records stored can be accessed from a single interface
- Content is stored in location structured by Sites, Libraries, Folders and Document Sets
- The use of built-in permissions
- A uniform metadata convention for all records
- All records are subject to the same retention/disposition policies
- Email threads can be combined to a single record
- eDiscovery (i.e. Search, Filter, Views) captures all records with the same process and procedures

CONS

- Manual upload and the need to apply metadata to make emails discoverable might make adoption of this process a challenge



WHY SHAREPOINT FOR PROFESSIONAL SERVICES

SharePoint is the most viable option for email management, because it gives you a single place to collaborate, manage, and secure your content and processes — while maintaining compliance and adherence to industry standards. With SharePoint you can improve your firm's ability to find, track, organize, approve, and archive documents of all types. Not only does SharePoint help from both a compliance and a collaboration perspective, there is a wide range of additional scenarios that it can help with.

Other benefits include:

- Increases productivity across project and client teams by making it easier to collaborate. All emails and documents are easily accessible, providing workers all the information they need to get the work done.
- Accelerates client unboarding, as important emails can be managed quickly and easily.
- Many industries within professional services will take a case management approach to managing client work. SharePoint helps streamline case and project management, by creating a digital 'paper' trail for every case and project and then bringing all relevant documents, emails, and other content together in one secure location.
- With SharePoint you can build better proposals. Users can collaborate, share information, and reuse existing documents when writing proposals, using one easy-to-find repository, where pertinent documents are collected and stored.





WHY OTHER SOLUTIONS DON'T WORK

SharePoint is the most viable solution. Here's a quick look at the reasons that other solutions don't cut it.

- Dedicated third-party solutions

Many organizations choose to invest in a third-party solution with dedicated email management functionality, such as OpenText, Netdocuments, iManage, Mimecast, or Veritas Enterprise Vault. These tools offer unique capabilities to manage emails efficiently. However, the most obvious downside to this approach is the necessity of spending money on a brand-new solution. Also, additional training will be required to get your users up to speed with the new technology. If you already have SharePoint, why not make the most of it?

- Combination of Microsoft apps and features

Emails are stored in Exchange via Outlook, while documents are stored in SharePoint or OneDrive. Here, the same problems occur with the gap between emails and other records. When emails are saved in one location and documents in another, important records are siloed away in personal inboxes. This presents serious issues for compliance.

SharePoint provides a central repository for all records, but it's lacking when it comes to user experience. [harmon.ie](#) fixes this problem. Find out how in the next section.



HARMON.IE: AN INTELLIGENT SOLUTION TO EMAIL MANAGEMENT

User experience is central to the success of modern enterprise apps. Out-of-the-box SharePoint has several flaws that need to be ironed out before it is the ideal solution.

Fortunately, fixing these problems does not require a complete overhaul of the platform – merely some tweaks to how users manage emails in SharePoint. *harmon.ie* is the intelligent email management solution that does that for you.

How *harmon.ie* enhances email management with SharePoint

As professional services workers spend the majority of their working day in Outlook, they need a way to quickly store emails in SharePoint and apply all the correct metadata.

harmon.ie takes the functionality of SharePoint and offers all of this – and more – in Outlook. The *harmon.ie* sidebar offers drag-and-drop capabilities and makes it easy for users to apply the correct metadata at the point of receiving an email.




With harmon.ie, users can:

- Capture the relevant emails
- Delete all the others (either immediately or over time)
- Classify emails accurately - so they can be found later
- Discover emails and records when needed

Users want to continue to work in email, without having to switch back and forth between apps. With harmon.ie, organizations gain a single place for collaboration, streamlined case and project management, and will always be compliant – all because users have the functionality of SharePoint in Outlook.

THE FUTURE OF INTELLIGENT EMAIL MANAGEMENT

harmon.ie is at the cutting edge of email management technology. Our solution uses powerful machine learning to predict which emails need to be saved as records and help workers decide how/where to store their information. This not only saves time for users, but also allows them to focus on core work rather than repetitive email management tasks. With harmon.ie, storing emails in the right place, with all the right metadata, and finding them when you need them, couldn't be easier.



YOUR APPROACH FOR BETTER EMAIL MANAGEMENT IN SHAREPOINT

In the next eBook in this series, we outline exactly what organizations need to do to help make email management work in SharePoint.

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Find out more about why the best tech solutions for your employees should be the easiest ones to use. Visit our website to [view additional resources on email management](#) or to [speak with a harmon.ie email management expert](#).

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