

# AIIM Market Intelligence

*Delivering the priorities and opinions of AIIM's 65,000 community*



## Email Management

*The good, the bad and the ugly*

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## About the Research

As the non-profit association dedicated to nurturing, growing and supporting the ECM (Enterprise Content Management) community, AIIM is proud to provide this research at no charge. In this way the education, thought leadership and direction provided by our work can be leveraged by the entire community.

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176 South Street, Hopkinton,  
MA 01748  
Phone: 800.222.3622 or  
508.435.1000  
Fax: 508.497.6904  
Email: [softwaresales@emc.com](mailto:softwaresales@emc.com)  
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1333 Third Avenue South  
Naples, FL 34102  
Phone: +1 (800) 932-5536  
Fax: +1 (800) 325-2555  
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## Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken by 1,109 individual members of the AIIM community between March 23<sup>rd</sup> and April 3<sup>rd</sup>, 2009, using a Web-based tool. Invitations to take the survey were sent via e-mail to the AIIM community of 65,000.

Survey population demographics, including email platform, can be found in Appendix A. Graphs throughout the report can be considered to be the complete survey unless stated. Most statistics regarding organizations are for those with more than 10 employees.

## About AIIM

AIIM ([www.aiim.org](http://www.aiim.org)) is the community that provides education, research, and best practices to help organizations find, control and optimize their information. For more than 60 years, AIIM has been the leading non-profit organization focused on helping users understand the challenges associated with managing documents, content, records and business processes. Today, AIIM is international in scope, independent and implementation-focused, acting as the intermediary between ECM (Enterprise Content Management) users, vendors, and the channel.

## About the Author

Doug Miles is head of the AIIM Market Intelligence Division. He has over 25 years experience of working with users and vendors across a broad spectrum of IT applications. He was an early pioneer of document management systems for business and engineering applications, and has been involved in their evolution from technical solution through business process optimization to the current corporate-level concerns of security and compliance. Doug has also worked closely with other enterprise-level IT systems such as ERP and CRM. Doug has an MSc in Communications Engineering and is an MIET.



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# Introduction

A mere four years ago, one of the questions in the AIIM email survey was “Which of your business interactions are likely to be carried out via email”. Today, email is pervasive across all aspects of all businesses - and is highly business-critical. For many information workers, the email client is their primary business application. They spend many hours of the office day reading, responding and collaborating via emails. Indeed, this survey shows that most also spend considerable amounts of out-of-office time checking emails and “staying in touch” with work.

Strange, then, that the email history created by these responses and interactions is so poorly maintained, and the ability of knowledge workers to search for important content within current and past emails – their own and those of their colleagues – is so poor. In a large organization, several millions of emails are handled each day. Most are of no lasting consequence, but each day there will be a significant number of important emails involving the organization in obligations, agreements, contracts, regulations and discussions, all of which might be of legal significance. In this report we will discuss how these important records are being dealt with, what policies are in place, how aware staff are of the issues, and which technologies are in use.

For the discussions within this report, an email management system may be a specialized stand-alone system, or an integration of an enterprise content management or records management system with the email client.

## Key Findings

- On average, our respondents spend more than an hour and a half per day processing their emails, with one in five spending three or more hours of their day.
- Over half have hand-held access by phones, Blackberries and PDAs. Two thirds process work-related emails out of office hours with 28% confessing to doing so “after work, on weekends and during vacations”.
- “Sheer overload” is reported as the biggest problem with email as a business tool, followed closely by “Finding and recovering past emails” and “Keeping track of actions”.
- Email archiving, legal discovery, findability and storage volumes are the biggest current concerns within organizations, with security and spam now considered less of a concern by our respondents.
- Over half of respondents are “not confident” or only “slightly confident” that emails related to documenting commitments and obligations made by staff are recorded, complete, and retrievable.
- Only 10% of organizations have completed an enterprise-wide email management initiative, with 20% currently rolling out a project. Even in larger organizations, 17% have no plans to, although the remaining 29% are planning to start sometime in the next 2 years.
- Some 45% of organizations (including the largest ones) do not have a policy on Outlook “Archive settings” so most users will likely create .pst archive files on local drives.
- Only 19% of those surveyed capture important emails to a dedicated email management system or to a general purpose ECM system. 18% print emails and file as paper, and a worrying 45% file in non-shared personal Outlook folders.
- A third of organizations have no policy to deal with legal discovery, 40% would likely have to search back-up tapes, and 23% feel they would have gaps from deleted emails. Only 16% have retention policies that would justify deleted emails.
- Overall, respondents plan to spend more on Email Management software in 2009 than 2008.

## User Issues

Like it or not, email is the nerve system of modern business. Compared to the phone, it's asynchronous and provides a written record to the sender and recipient for follow-up action or later reference. In this respect, it is much more useful than instant messaging or social networks. It can be frivolous or deadly serious – it's possible to be fired via an email, but also due to an email. Many vital decisions are made by email exchange, and the implication of our usage findings is that these may be made on the move, on tiny screens, and when otherwise off-duty.

Whether within their own office or between organizations separated by thousands of miles and many time zones, the sender will assume that all sent emails are received, and that they are read. They will frequently expect a response within hours, let alone days. All this despite the ease of misaddressing, the hit and miss nature of mobile synchronization, the spam filters, the reply-to-all clutter, and the mass deletions required to stand any chance of keeping one's inbox usable.

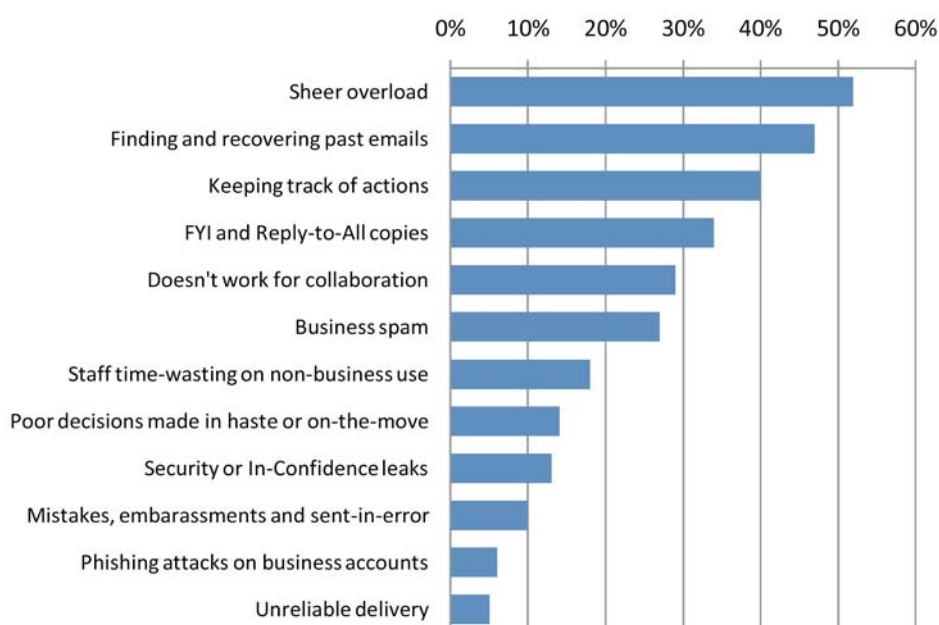


Figure 1: Which **THREE** of the following would you say are the biggest problems generally with email as a business tool? N=1,015

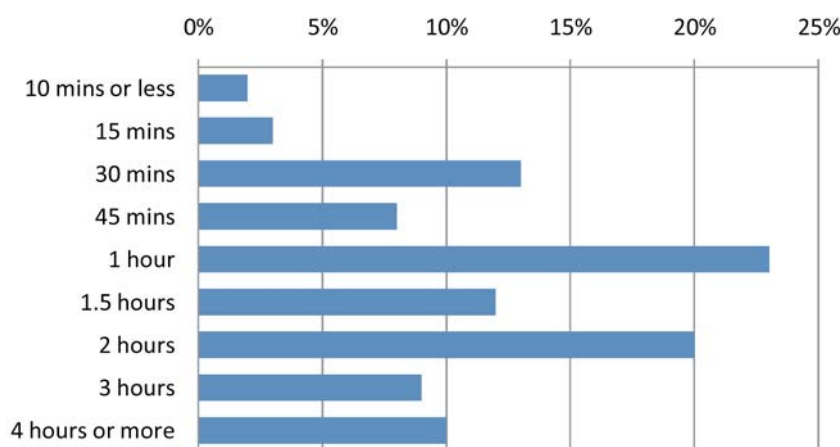


Figure 2: On average, how long do you spend per day processing your emails? N=1,026

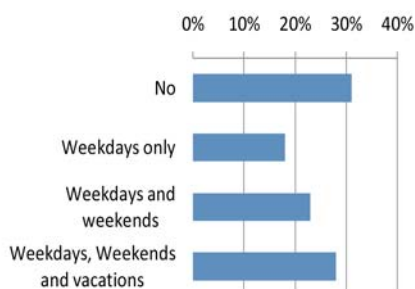


Figure 3: Do you normally process work-related emails outside of normal office hours?

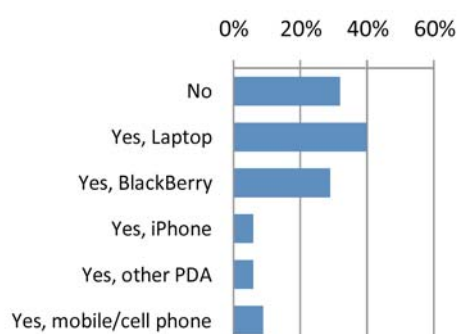


Figure 4: Do you use a mobile device to access emails on the move?

## Business Drivers

At first sight, legal compliance would seem to be the major driver for taking better control of emails. However, with so much time taken up by searching for emails – within one's own mailboxes, those of current colleagues, or staff who have moved on – ROI from efficiency improvement is a genuine justification. Indeed, in larger organizations these two aspects combine in terms of the efficiency of preparing or responding to legal action, remembering that the legal staff involved are likely to be highly paid. Against this must be weighed the time taken for staff to select and index emails for archive, although we will see that this can be automated with reasonable results.

A further financial return is possible due to reduced server storage space. Off-loading email records to a separate email management system, or to the corporate ECM system, allows for a more severe deletion policy on the email server itself.



Figure 5: What would you say are the 3 issues of most concern in your organization at the moment regarding emails?  
N=1,010



## Compliance:

The overriding issue for compliance is the realization that important emails are just as likely to be records as any paper document or electronically generated document. Once this is recognized, the implications of how such emails should be archived and preserved in a controlled and findable way will highlight the shortcomings of the primary email server, particularly if it is Exchange, or indeed if it is outsourced or in the "Cloud".

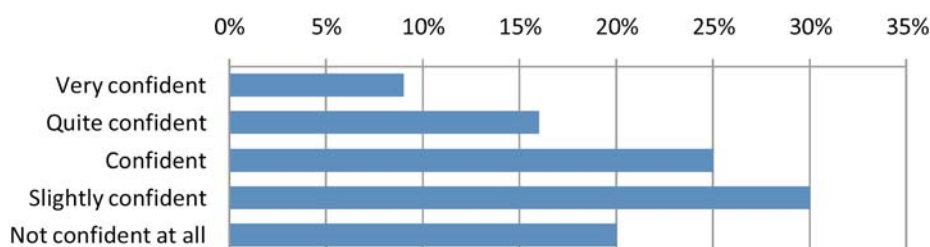


Figure 6: How confident are you that emails related to documenting commitments and obligations made by you and your staff are recorded, complete, and retrievable? N=1,021

Policy and practice can have implications. Nearly a third of organizations have a policy that insists on signed paper or faxes for all contractual commitments. If these are scanned and stored for general access as image files, then all well and good. If filed as paper, they are likely to be unavailable to general staff. Twenty percent accept that email attachments may be part of important contractual commitments. Of the remaining, half agree that both attachments and their associated email messages can be important for these contracts, and half are aware that complete email conversations (threads) are likely to be important regarding contractual commitments.

## Legal Discovery:

The US Federal Rules of Civil Procedure were changed in December 2006 to include disclosure of all electronic document types in pre-trial discovery, including emails. This has created an increased drive for a reliable single-search option across all repositories, including current and archived emails. There is a further need to place a legal hold on selected documents, preventing their deliberate or programmed deletion. The ability to apply this at single record level, rather than at folder or repository level, minimizes disruption.

There have also been a number of high profile cases involving the retrieval of emails from back-up tapes. One would expect this to have brought into focus the difference between back-up (restoration of the repository to its state at a given date/time) and archive (able to use selection criteria to find specific emails), but in our survey 64% of respondents feel that their organization doesn't understand the difference.

Perhaps one reason for this is that in 20% of organizations, email policy decisions are made by IT with no input from Records Management or Legal. An honest 8% of respondents admit that in their organization no one makes email policy decisions, and it is completely out of control!

On the positive side, 23% of organizations feel able to carry out a legal discovery across their email archive, with 7% able to carry out a single search across all of their records repositories. However, only 16% feel they could justify deleted emails based on retention policies, and as regards legal hold, just 12% are able to prevent deletion or movement across both active and archived emails.



Figure 7: As regards litigation procedures, which of the following would apply to your organization?

As can be seen in Figure 8, over a quarter of organizations would take more than a month to produce documents for a legal discovery process. As regards the likelihood of being required to produce such evidence, eliminating the don't knows, 18% had been exposed to a legal challenge in the last 12 months and a further 15% in the last 3 years – a one-in-three chance overall.

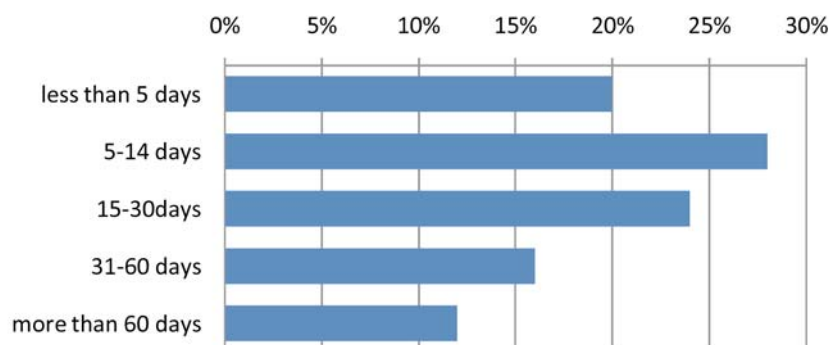


Figure 8: How long would it take to produce all of the organizational information related to a former customer or constituent?  
N=468

One intriguing finding of our survey was that 14% of respondents (118) said they had “experienced a legal challenge regarding recovery of the exact context of an archived, saved off, or printed email (e.g., format, embedded graphics, attachment, metadata, signature)?” Despite providing an additional comment box, we received no further input on this. We may return to this area in a future survey.



## Formal Policies:

Staff awareness is as much a part of legislation readiness as technology, although good technology can be used to automate some of the good practice required. We asked about policies related to a number of email usage aspects, and whether some were backed up by automated processes.

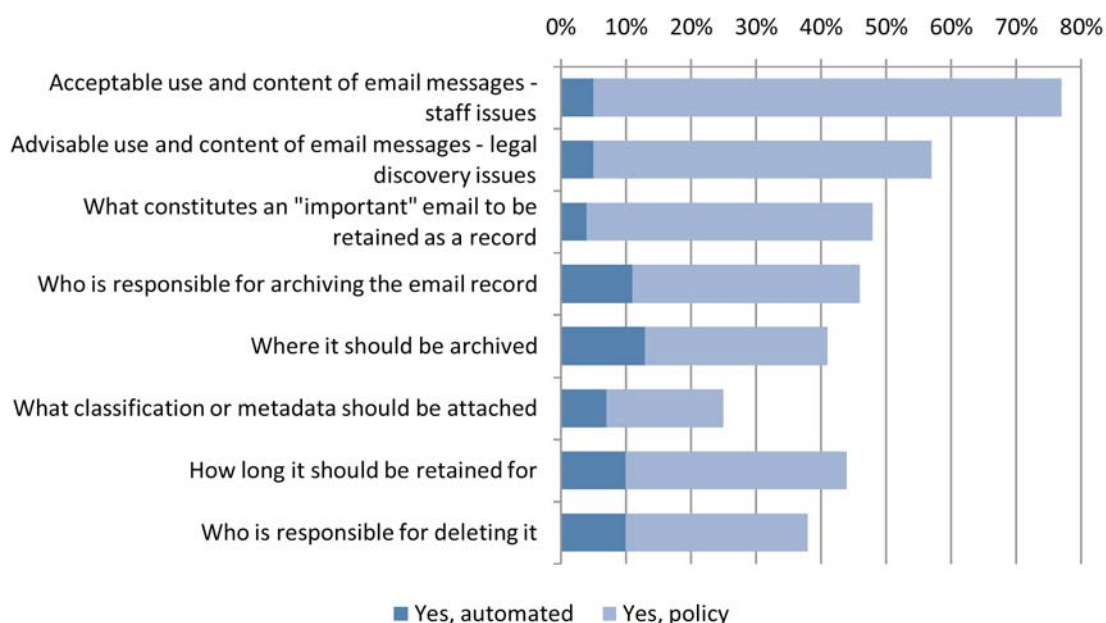


Figure 9: Does your organization address any of the following through formal policies, guidance, or (partial) automation?

As indicated above, guidance is frequently lacking as to what constitutes an "important" email, and whilst an automated records capture can help with classification and subsequent retention policies, it is seldom relied upon for the all important first step. There is evidence that some organizations have good intentions regarding records declaration, but fail to define where they should be archived.

One aspect of declaring emails as records should be that they are extricated from personal inboxes and placed into more widely accessible and searchable systems, encouraging collaboration and knowledge sharing. We can see from Figure 10 that in 45% of organizations they stay in the personal Outlook folders - unshared, possibly un-findable and at considerable risk of random deletion. 18% at least make them available in a shared folder or network drive whilst a further 18% print important emails and put them in the traditional filing cabinet as paper copies. As far as the good guys go, 12% capture to a general purpose DM/RM/ECM system, and 8% have a dedicated email management system.

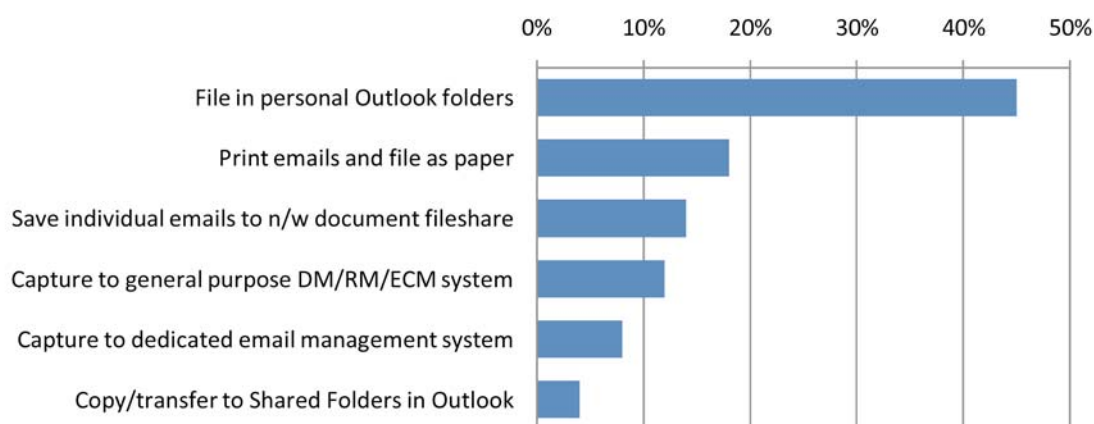


Figure 10: Which of the following would best describe standard practice in your organization for dealing with "important" emails? N=857, >10 emps

## The Outlook Mail Client

We have seen from the above that in 45% of organizations important emails are never moved from the recipients' personal folders. To this, Outlook adds a further ugly twist. The so called "Archive" function, largely used to keep down inbox sizes or to avoid fixed-term deletion policies, creates a secondary database - the notorious archive.pst file. The default location for this important repository is on the user's local hard drive – bad enough as a desktop, but it could as easily be on a laptop. If more than one desktop, or a desktop and a laptop are used interchangeably, multiple "archives" can easily be created by the unwary leaving big gaps in the email record. This scenario can be avoided by setting policies to place archive.pst in a networked and backed up location, but an astonishing 44% of organizations fail to do so, even those with over 5,000 employees.

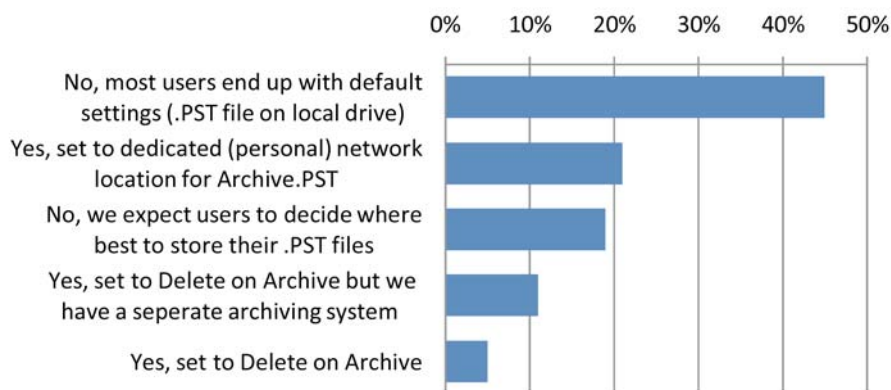


Figure 11: Do you have a policy on Outlook "Archive settings" (or equivalent in your email client)? N=901, >10 emps

The situation is exacerbated further by email deletion policies. Threatened with overwhelming volumes, some IT managers are inclined to be ruthless with deletions.

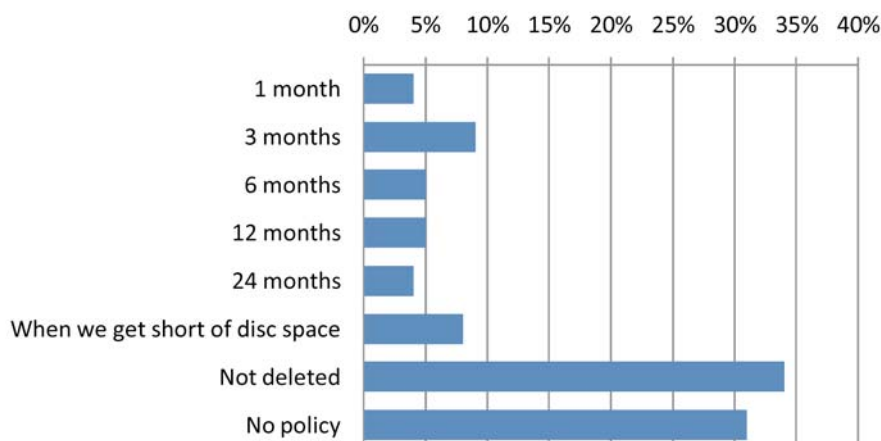


Figure 12: After what period are emails automatically deleted? N=910, >10 emps

This can result in evasive action being taken by users, hiding their .pst files on local drives or on the network in order to hold on to their emails. In 10% of organizations, this practice is banned and .pst files may be deleted, but in a further 10%, the practice is accepted and such files can be either indexed in place, or copied to the email archive.

A new feature called Messaging Records Management is available in Exchange 2007 which allows "managed folders" to be set up within all user mailboxes, with some basic policies attached for deletion, retention or copying. Users are still responsible for assigning emails to the managed folders and there are no classification options other than the folder tree. They remain as personal folders unless set up to automatically copy after a given time to a separate shared mailbox, journal file or dedicated archive system. Uptake of Exchange 2007 has been limited by the 64-bit server hardware requirement.

## Email Management Adoption

Some 54% of organizations with over 10 employees have yet to implement an email management strategy, and even amongst larger organizations (over 5,000 employees), 46% rely on basic mail-server functionality. However, the good news is that 29% plan to rectify this within the next two years.



Figure 13: What stage is your organization at with regard to implementing an email management strategy over and above the basic functionality? N=946 >10 emps, N=295 >5,000 emps

The most prominent reason non-adopters gave for not yet implementing an email strategy was that they had no records management system.

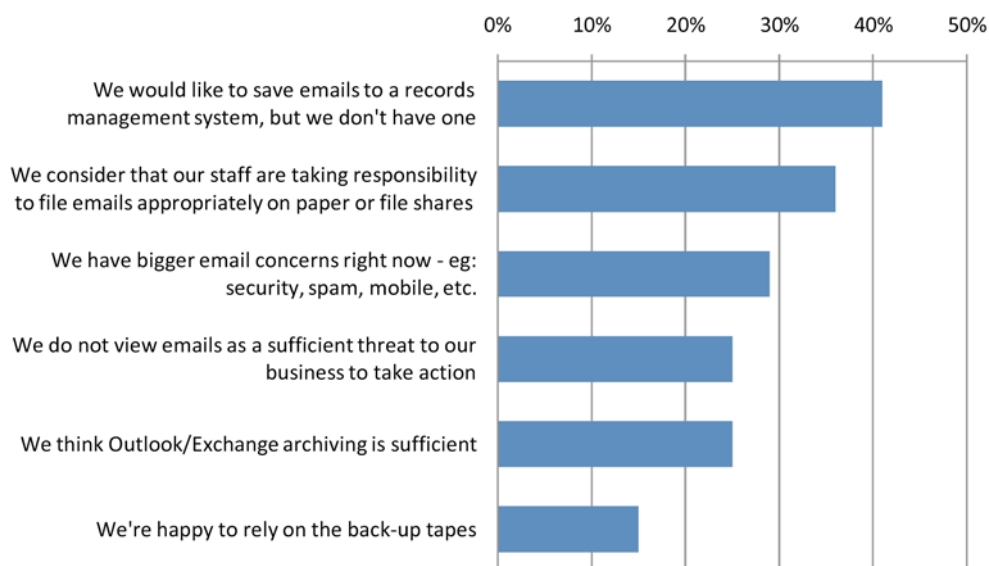


Figure 14: What would you say are the TWO most prominent reasons as to why you haven't yet implemented an email management strategy? N=424 non-users

As we discussed earlier, email management technology can be implemented as a stand-alone system or as part of an enterprise-wide ECM or Records Management system. Most document and records management systems provide simple interfaces to the email client, allowing emails to be declared as records. Their ability to deal with attachments and conversation threads can be more limited than those of a dedicated email management system.

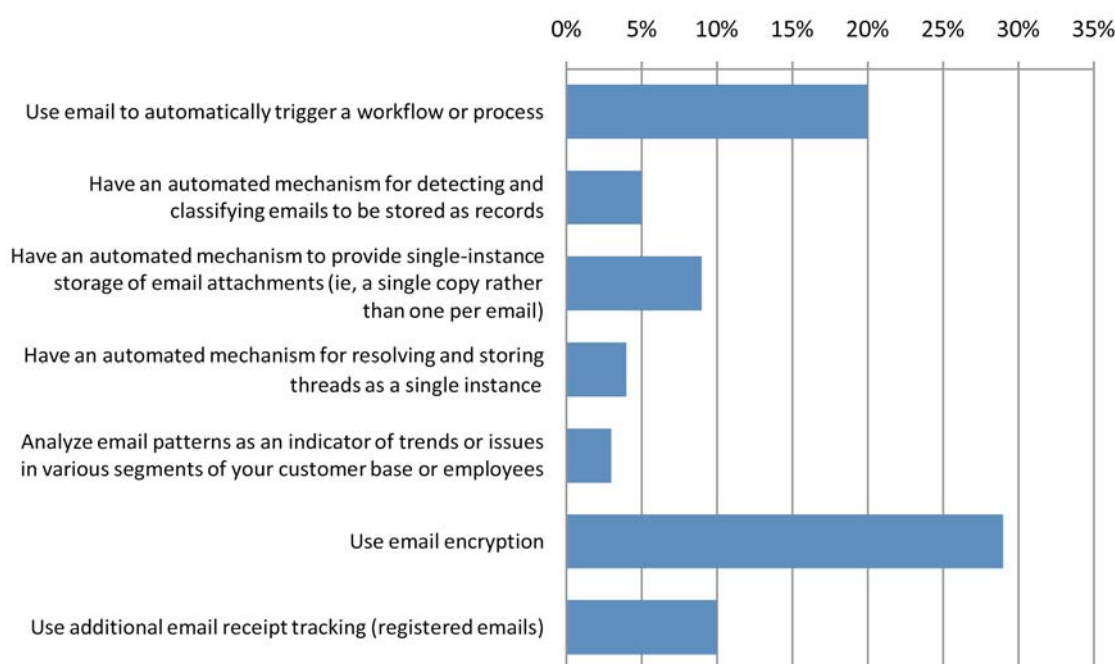
In large organizations faced with massive volumes of email, hybrid systems may be required to avoid overwhelming the ECM system with day-to-day active emails. Policies here can dictate capture of *all* emails to a dedicated and highly scalable email store, with heavily automated mechanisms for classification, possibly with subsequent transfer as records to the records archive. Search and legal hold will then be applied across both systems. An alternative to providing this heavy storage in-house is to outsource the email archive as a turn-key service.

### Advanced Features:

With regard to more sophisticated features within Email Management, email encryption is popular, although that brings its own records management issues with regard to full text search and automatic indexing.

In many organizations, receipt of an email marks the beginning of a process – for example receipt of a help desk request, or a web form completion. In these situations a rapid ROI can often be gained by setting up the incoming email to automatically trigger a workflow or process. This can be extended via business intelligence reporting to include trend analysis amongst customers or staff.

Figure 15: Does your organization...



As mentioned before, use of an external email archive can reduce storage on the mail server by allowing sharper deletion policies. Respondents in our survey have saved over 40% storage capacity with some saving up to 90% - a considerable benefit when back-up time as well as capacity are taken into account.

Single instance storage within the email archive, particularly of attachments identified as identical, produced reported savings of between 40 and 60%. Similar techniques can also be applied to multiple threaded conversations. We have heard reports that some legal counsel advise against this as it could be considered to disrupt the context of the email. We found this to be a very small minority, but some have decided not to switch this on anyway.

We found that for those using automatic email indexing, around a third found it to be less reliable than manual indexing, a third felt it to be the same and a third found it more reliable.

### SharePoint:

Despite the high levels of SharePoint adoption that we saw in our ECM survey, only 5% are currently using it for email management, with a further 14% planning to do so in the next 2 years. Of those with no plans to use it for email, 16% indicated that they were uncertain of SharePoint's records management capability.

## Levels of Spend

Predicting levels of spend for 2009 has to be a difficult call. Our ECM survey earlier in the year indicated that email management was likely to be one of the more robust areas of ECM spending. This is confirmed in this survey as regards software licenses, and we feel this to be heartening given the current shortcomings uncovered. Of some concern is a reduction in spending on professional services and outsourcing, and in particular on training, which is consistently highlighted in our surveys as a likely reason for failed implementations.

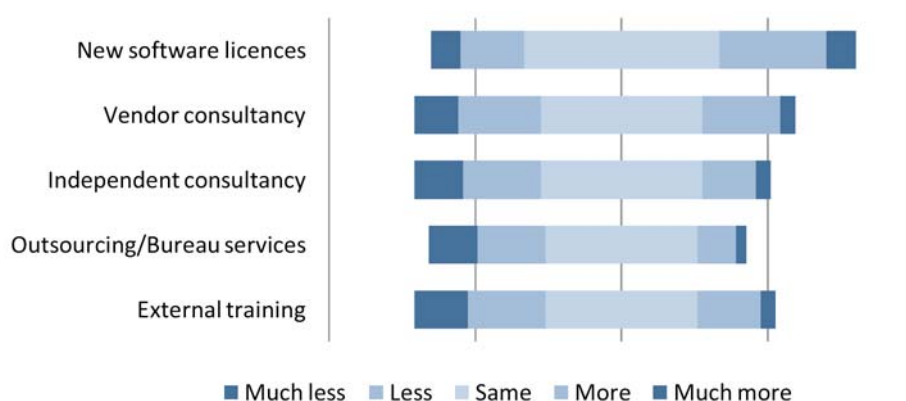


Fig 16 : How do you think your organization's Email Management spending will be in the following areas in 2009 compared to 2008? N=800, >10 emps, ("We don't spend anything on this" responses indicated by shorter bar lengths.)

As we discussed earlier, many organizations are now looking to integrate their email with their ECM or RM system as a priority, with legal discovery and search as the next priority. The choice seems to fall 2 to 1 between linking with ECM or RM systems and installing a dedicated email management system.

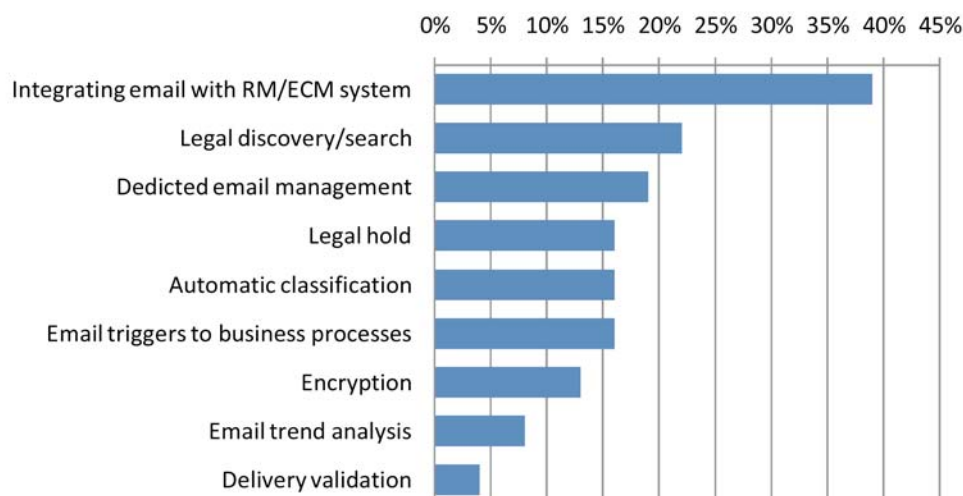


Figure 17: In what technology does your organization plan to invest in the next 12-18 months?

## Conclusion

Taking the report's sub-title as a lead, the good news is that email management issues are now better understood, and a third of organizations plan fresh investment in this area over the next two years. The bad news is that even within their current technology limits over 50% of organizations have set no policies for dealing with important emails as shareable and retrievable records, nor do they have policies for legal discovery processes. There are many ugly findings. Probably the worst is that most organizations are not protecting users from the misleadingly named "archive" setting within the Outlook mail client, which as a default moves older emails from the server onto the local hard drive. Another ugly one is that 40% of organizations might need to search back-up tapes in the event of a legal discovery requirement, and that 84% would have no way to justify why emails of a certain age or type had been deleted.



# Survey Demographics

## Survey Background

The survey was taken by 1109 individual members of the AIIM community between March 23<sup>rd</sup> and April 3<sup>rd</sup>, 2009, using a Web-based tool. Invitations to take the survey were sent via e-mail to several thousand individuals.

## Survey Demographics

### Organizational Size

Survey respondents represented organizations of all sizes. Larger organizations over 5,000 employees represented 28%, with mid-sized organizations of 500 to 5,000 employees at 29%. Small-to-mid sized - 10 to 500 employees - were 34%.

### Industry Sector

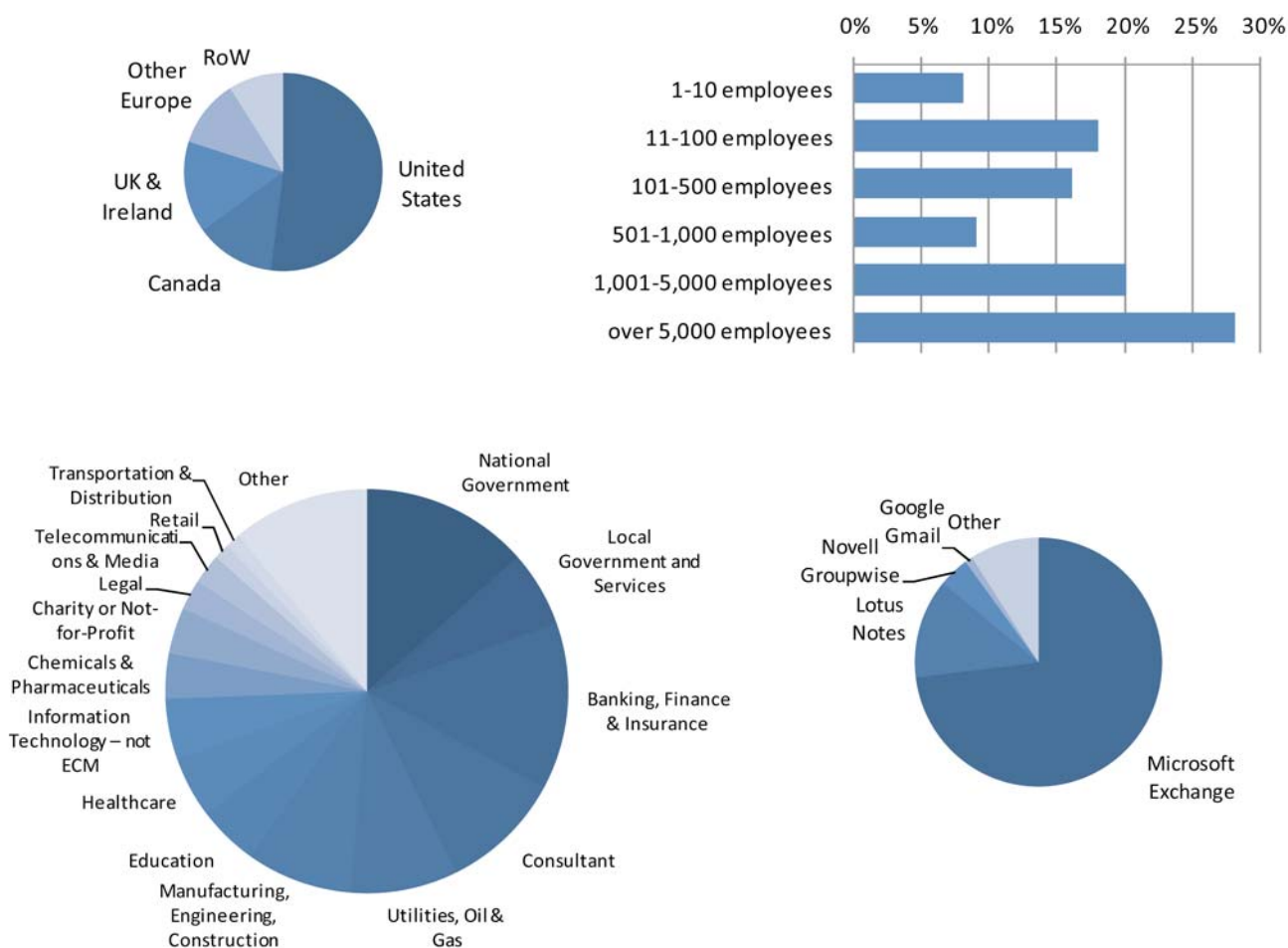
Local and national government made up 16%, the IT sector 22% and finance and insurance 11%. The remaining sectors were evenly split. IT suppliers of ECM are removed from some critical results, and from the chart below.

### Geography

US and Canada 65%, UK and Ireland 15%, mainland Europe 10%. Rest-of-world 10%.

### Job Function

32% Information or Records Management executive or staff, 16% IT executive or staff, 10% CIO, 8% line of business, 8% CEO or equivalent.



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For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel - acts as the industry's intermediary.

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AIIM

1100 Wayne Avenue, Suite 1100

Silver Spring, MD 20910

301.587.8202

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