

NOTES

Overcoming E-mail Management Stumbling Blocks

MER 2008 Town Hall Meeting #2

Chris Burns
Cohasset Associates

Bonnie McClinton
Halliburton

Michael Osterman
Osterman Research

About Cohasset Associates

- ◆ Founded in 1969
- ◆ One of the nation's foremost management consulting firms specializing in document-based information
 - From traditional to electronic records management
- ◆ Education & thought leadership: white papers, survey research and MER Conference

© 2008 Cohasset Associates, Inc.

About Halliburton

- ◆ Founded in 1919 by Erle P. Halliburton in Duncan, Oklahoma
- ◆ Halliburton adds value through the entire lifecycle of oil and gas reservoirs, starting with exploration and development, moving through production, operations, maintenance, conversion and refining, to infrastructure and abandonment.
- ◆ Offices in over 120 countries, employing over 44,000

© 2008 Halliburton

NOTES

About Osterman Research

- ◆ Founded in 2001, based near Seattle, Washington
- ◆ Focused heavily on studying the role of electronic communications in the workplace: email, IM, VoIP, collaboration, Web 2.0, etc.
- ◆ Continually conducts primary research among IT professionals and end users
- ◆ Clients include a variety of vendors and end user organizations

© 2008 Osterman Research, Inc.

Leading Problems in Messaging

- ◆ Increasing backup and restore times
- ◆ Increasing message size
- ◆ Using email as a knowledge store
- ◆ Legal liabilities
- ◆ Complying with government data retention statutes
- ◆ Protecting intellectual property
- ◆ Improving email system efficiency
- ◆ Lack of messaging-related disk space
- ◆ Mailboxes being overloaded
- ◆ Enforcing an email retention / deletion policy

© 2008 Osterman Research, Inc.

Retention Practices for Email

Does your organization have a formal email policy regarding retention practices for email?

| Response | 1999 | 2001 | 2003 | 2005 | 2007 |
|----------|------|------|------|------|------|
| A. Yes | 45% | 53% | 41% | 51% | 49% |
| B. No | 55% | 47% | 59% | 49% | 51% |

© 2008 Cohasset Associates, Inc.

NOTES

One Company's Strategy

- ◆ Halliburton undertook a comprehensive approach to email management

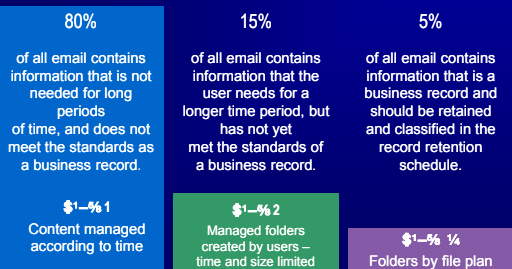
© 2008 Cohasset Associates, Inc.

Halliburton's Email Challenges

- ◆ Different methods of email storage by region
- ◆ Users complaining about current email policy
- ◆ Unlimited user-controlled .PST storage
- ◆ Users not aware of need to retain business records
- ◆ Impetus coming from the Law department versus IT

© 2008 Halliburton

Halliburton's Plan



© 2008 Halliburton

NOTES

Three Management Zones



- ◆ Zone 1
 - Contains Inbox, Sent, Junk, Deleted Items
 - Unlimited size
 - Auto-delete after 60 days
- ◆ Zone 2
 - Contains managed folders created by users
 - Limited to 150 MB
 - Auto-delete after 2 years

© 2008 Halliburton

Three Management Zones

- ◆ Zone 3
 - Contains folders created by RIM
 - File plans developed for each unit
 - ⇒ Provides information on what to keep, for how long
 - Files are sent to LiveLink repository where retention is applied based on folder in which the document is placed

© 2008 Halliburton

Halliburton's Solution Partners

- Microsoft Exchange Server 2007
 - ⇒ Managed Folders utility
- Microsoft Outlook
 - ⇒ 2007; 2003 can be used, but with loss of user enhancements
- OpenText's LiveLink
 - ⇒ Email Manager
 - ⇒ Repository for electronic storage
 - ⇒ Record Manager
- Halliburton's Law Department, IT & Employees

© 2008 Halliburton

NOTES

Another Strategy: Message Archiving

- A server, appliance or service that captures and preserves email content entering or leaving an email server or other email-generating application.
- A *true* archiving system does three things:
 - Indexes content
 - Preserves content in an archive
 - Provides robust search tools for extracting data from the archive



© 2008 Osterman Research, Inc.

Other Strategies

Is your organization's email records retention policy:

| Response | 2007 |
|--|------|
| A. Time based (e-mails over a certain age are automatically deleted) | 33% |
| B. User-based (users determine whether to save or delete messages based on your organization's policy) | 60% |
| C. Group-based (e-mails deleted automatically, based on the association an individual has with a particular department or business function) | 7% |

© 2008 Cohasset Associates, Inc.

For discussion...

- ◆ Overcome management resistance or secure their support
- ◆ Determine best strategy for your company
- ◆ Handle records retention requirements
- ◆ Educate and train employees
- ◆ Manage transition to new process
- ◆ Other issues of concern

© 2008 Cohasset Associates, Inc.
