



What Are the Uses of Email?

Addressing the Challenges of Email Management

Introduction

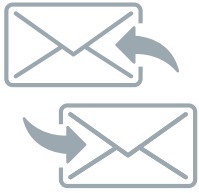
Around 2010 when social media started to become more popular and mainstream, people started talking about the end of email. Some ideas started circulating that social media platforms would replace emails, especially with the younger generations.

To some extent, social media has replaced email in certain circumstances. However, it still remains a ubiquitous method to communicate and perform other sorts of tasks. The continued use of email, often in ways it was never intended to be used, has culminated in all sorts of problems for the modern workplace and the records and information management (RIM) professionals tasked with devising solutions.

Email has been around for a long time, in technological terms. It's had a chance to mature as a common workplace tool and to implant itself as a normal part of the culture. Habits around emails are often firmly set and deeply ingrained, only adding to resistance faced when introducing changes around this popular communication method.

Before email habits can be changed, or modified, it is important to understand how email is being used. It's also critical to figure out why email is still so popular, even when other, often better, options are available to accomplish the same tasks.

The Many Uses of Email



Email started out as a simple communication tool but is now used for much more than that. It has become a standard mode of communication with the expectation being that everybody should have an email address. Despite all the methods of communication available, email still remains popular and has become as necessary as a phone number or physical mailing address.

In many ways, email has made our lives easier. It allows us to:

- Contact people all over the world for free (or inexpensively)
- Communicate with more than one person at a time, often privately
- Document interactions (e.g., the highly prized cover your bleep paper trail)
- Leave messages any time of day without bothering people, or schedule them to be sent at a specific time
- Use automation and/or artificial intelligence to reply, file emails automatically based on rules, or integrate seamlessly with other apps such as calendars and contacts
- Share information (e.g., links, documents, etc.)
- Access what we need from anywhere by sending it to ourselves in the body of an email, or as an attachment



Email worked great as a communication tool. It was only when people started using it in alternative ways that things started to get messy. Instead of establishing a limitation with email and utilizing other strategies, it kept evolving to meet new demands and expectations such as:

- Working collaboratively
- Sending attachments
- Conversing with multiple people (e.g., threads)
- Increasing search capabilities
- Automating actions with rules
- Integrating email content with calendars and appointments, etc.
- Retaining a personal history of our lives, interactions, and transactions
- Reminding ourselves to do something

Due to the perceived versatility, and comfort using email, many people began to live out of their inboxes. Some of these new demands were a natural fit for this mode of communication, while others stretched the limitations and made it seem really clunky. For example, sharing digital photos through email was never a good solution. Attachments are large and can quickly clog up an inbox, or take a long time to download, making it problematic for both the sender and the recipient(s).

The Challenges of Managing Email



In a lot of ways, managing email can be a challenge for RIM professionals. Email is not necessarily the problem. It's how we use it, or force it to be used, and think about it that is the real issue. Over the years, email has been used, sometimes inappropriately, as a workaround for many common workplace challenges, such as working collaboratively on documents or accessing information remotely. Many of the problems and challenges we now face with email are really symptoms of larger issues, inefficiencies, and outdated technologies.

As a communication tool, email is a way to replace verbal conversation. In some ways, we treat email like it can emulate the same qualities associated with having a conversation such as being able to seamlessly transition between topics, mixing personal and professional, and responding instantly. Although email is capable of doing these same things, it doesn't do it as well. The end result is a large volume of poorly created emails, which makes the information management aspect challenging.

Many information professionals and strategies treat email management like a separate entity of RIM. However, correspondence is usually not a separate records series because it's always about something or is part of a process related to records creation. Yet somehow, these strategies and theories seem to fall apart when it comes to email management.

So what's different about email? Why is it so challenging for us to manage?

1. Email is used for more than just correspondence.
2. People have grown to rely on email for any number of uses.



People use email for all kinds of things beyond its primary use for correspondence, alternative usages that are so common they've defined the new norm for email.

Email has now become a reliable, dependable, and normal method for any number of functions, including but not limited to reference, collaboration, storage, task management, mobile access, calendars & planning, and covering your bleep.

It's common to see inboxes or work with people who think it's normal to either never empty their email trash ("just in case") or use the trash as a repository for reference materials. Gmail even offers an option to store every email in an "All Mail" folder which, according to Google ["is your archive, a storage place for all the mail you've ever sent or received, but have not deleted."](#) This "All Mail" folder sounds pretty similar to the .pst folders people used to create to save everything.

Why is Email still popular?



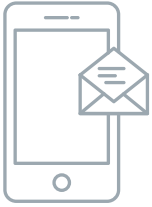
Using emails in new and unintended ways has offered us some immediate solutions to common workplace challenges, even if those solutions are clunky and inefficient. Even knowing that better options now exist for the things email doesn't do well, people still stick with this option. Below are a number of reasons why email is still popular, even with the advent of so many new social applications and email alternatives coming into the workplace. This section is followed by some suggestions for making foundation changes to help resolve ongoing challenges.

- **Habit** – Email has been around for decades and many people are comfortable using it. Most people know how email works and it works with everybody regardless if they're using Gmail, Outlook, etc.
- **Standards** – Email can be sent from any provider to any provider. This gives email the advantage over other forms of communication like social media where you can't for example, send a Facebook message to a Twitter account.
- **Collaboration** – When collaborating on documents, sometimes people use email because it captures commentary with an attached document and verifies who it was sent to. Even when people can send a hyperlink to a document in a shared repository, sometimes it's still useful to have comments or dialogue accompanying the document, which is still often done through email.
- **Reliability** – Perhaps because email has been around for over 30 years, it is seen as a reliable method to communicate with others.
- **Accessibility** – One of the biggest challenges with mobile workers is having access to necessary documents. Depending on how the company platform is set up, sometimes employees email attachments to themselves, or others, so they can access the documents reliably and remotely as a workaround.
- **Culturally ingrained** – Using email has become an integral part of the workplace culture for a variety of reasons.
- **Cover your bleep** – Email is often used to create a “paper” trail or to document various interactions.
- **Privacy and Security** – Email offers a way to converse with one person, or many, all in a relatively private way, something that is not always available through social media.



When email is so readily available and easy to use, it's not surprising many people rely on it. During one fast-paced contract, I collaborated with two other consultants. I suggested setting up a collaborative platform for the work we were going to do jointly, but the timelines were so short that there wasn't time to set something up and have everybody learn it. One teammate remarked, “we'll just have to make do with good old-fashioned email.” Even though email got chaotic at times, we were ready to go instantly.

Making Foundation Changes



Many challenges existing with email management have to do with how and why emails are being created and what they are being used for. Here are some of the main challenges:

- Mixing personal and professional in the same email
- Inadequate or useless subject lines
- Combining multiple subjects (or projects) in one email
- Understanding when it is appropriate to email instead of speaking with somebody directly
- Lack of designated roles and responsibilities regarding who is responsible for saving emails / attachments
- Sending attachments instead of using alternative methods (e.g., sending hyperlinks, setting up collaborative working areas, etc.)
- Confusion about how or when to use email to cover your bleep

There seems to be a general understanding that email is important, it's just not always clear to users which ones are important, or how / when to create an email with long term business value. Many of the email management clean-up strategies focus on identifying and capturing those "important" emails after creation, but they don't seem to incorporate any tactics for reducing reliance on email by providing alternative options, or how to train people on properly creating important emails in the first place.

Have we given up on trying to educate users on these basic concepts? Or on spending time analyzing and assessing why people are creating and relying on emails as part of resolving the challenge? Is it a better strategy to compensate for poorly created emails and save too much hoping that the important ones make it into the mix, even if we employ automation to help with this task?



Since it looks like email is here to stay, perhaps some time and attention could be geared towards:

- Understanding why people are relying on email – what are they using it for?
- Developing strategies to reduce dependency, for example, investing in technologies that allow people to collaborate on documents directly with embedded comments, rather than sending around messy attachments, or set up messaging boards, intranet pages, or other ways to communicate mass messages with short-term value
- Instructing users on the basics of constructing proper emails as part of the solution, including when an email should be created
- Employing automation to help users capture and classify important emails consistently
- Utilizing automation to help users construct emails with the proper information and at the right time in the process

Even though many email management solutions can be very successful, if they're capturing poorly created emails that haven't been labeled properly, even the most sophisticated, high-tech solution will never resolve this fundamental challenge.



What is the Function of Format?



As RIM professionals, we're taught to apply principles, best practices, and standards regardless of format. Even though format sometimes requires us to accommodate unique characteristics, it's understood that everything falls under the same umbrella. For example, when devising retention rules, the retention is applied in the same way to a record series whether the record is in a physical or electronic format.

However, this logic, and applying retention rules regardless of format becomes a bit flawed in a few scenarios, especially when it comes to destruction. In many situations, it seems that people feel comfortable to shred paper only because they know the information is still available electronically. For a RIM professional, this can become an opportunity for an educational moment on the difference between a record and a convenience copy. Or it could provide an opening to discuss the merits of a scanning program and developing business rules around what needs to be kept, for how long, and in which format. In most scenarios, applying retention rules to only one format of a record series ultimately results in being non-compliant with the schedules.

In other situations, people may be more inclined to save more because information is created and/or stored electronically. For example, I once had a conversation with a lawyer who told me he typically didn't keep his drafts when they used to be done on paper with edits & comments. He then added he did keep electronic drafts because it seemed easier and took up less space than paper. If the information really is important enough to keep, then the format should be a maintenance or storage consideration, not a determining factor for retention. The decision to retain records should be based first on a legitimate need and not on format by default.



The general impression of working with electronic formats, as opposed to physical ones, is that everything should be saved. It's not uncommon for employees to question RIM professionals about why anything needs to be destroyed when it's so easy to save everything. To some extent, it is easier to save electronic items than their physical counterparts. Physical items require one to find someplace to put it. But in the electronic world, one only needs to hit "save" and leave it wherever it is.

Electronic formats accumulate more rapidly because it's harder to see the true volume, especially when items are saved in multiple repositories. Seeing the pile-ups and legacy is more difficult. Additionally, many people are under the impression that digital storage is cheap. By comparison, it is cheaper to store the same volume of "stuff" electronically than it would be to pay for physical storage. However, when one considers how many times an electronic item is replicated for backups, copies, development, or QA environments, those storage costs can start to add up. It also doesn't take into account the soft costs of how much time is spent searching for something or on maintenance.



The other place logic flaws appear with regards to formats is when users consider how to organize documents with folder structures, or metadata elements, for example. As a metadata element, the format can be extremely helpful for filtering or sorting. It can make finding that PowerPoint presentation (.ppt) or email (.msg) or excel spreadsheet (.xlsx) a lot easier when search results can be restricted to a certain format. In folder structures, however, it gets a lot more complicated.

I've observed that many users like to have entire folders dedicated for things like:

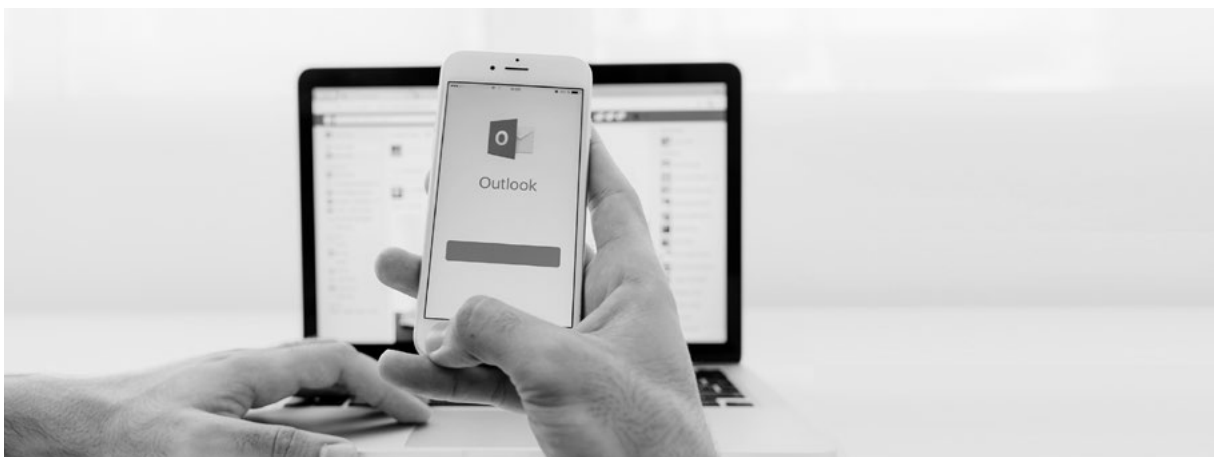
- Presentations
- Emails
- Videos
- Images (Pictures, Photos, etc.)

Often, the name of the folder is equally as descriptive. The challenge with organizing electronic items in this way, is that content gets separated from its context simply because it's in a different format. For example, training materials could incorporate a variety of different formats, such as presentations, handouts, instructional videos, etc. If each one of these materials is stored in a different location simply because of its format, it makes it more challenging to locate all the materials related to a specific course / topic when they're needed for a training session or updating later on.

Presentations are another format that often gets saved separately from the content they're supporting. A lot of times, presentations are created to provide an overview or summary of a project, report, plan etc. If the decision is made to create a separate folder for presentations, this often leads to one of two outcomes.

1. The presentation is stored separately from the related and supporting content, with a bunch of other presentations that are likely about a whole range of different topics.
2. The presentation gets buried in another folder within the parent project / report / plan folder creating deep folder structures that can be difficult to navigate.

To highlight format as the primary label for organizing presentations negates some of their other elements that could be even more important such as the topic, audience, or context.



So what function does format serve? What is the best way for RIM professionals to incorporate this vital piece of information in a way that satisfies our requirements and meets user needs?

Format is a necessary consideration for storage, maintenance, and retention. It's also a critical piece of metadata, especially when used as a filter to narrow down search results. That's about the extent of it. Using format to organize electronic items in folder structures, basing retention decisions solely on format, or allowing users to create folders called "email" or "presentations" should all be things that we, as RIM professionals, strive to resolve in more innovative and sustainable ways.

Conclusion

In summary, as RIM professionals, much work still remains to manage email effectively. However, relying solely on advanced technologies and / or automated solutions is not the only tool we have available to us. Email is a multi-dimensional challenge, and that means myriad options exist to resolve it, many of which can be used in combination with each other to achieve the desired end result.

Firstly, it's important to assess why people are using email. For example, perhaps people are using it simply out of habit when better options are available. In this case, efforts should be focused on training and communications, rather than investing in costly technological solutions. Or maybe people use email because they have no other options available, in which case a combination of strategies may be best suited to resolve some of the main challenges.

Since email is so often considered as a separate entity to organize, manage, store, retain, etc. by both workers and RIM professionals, it's important to think about what function the format is serving. Assess when format is a necessary element to improve something and determine when it is making a situation more complicated than it needs to be.

Incorporating all these different factors into a solution for a better way to move forward with workplace email challenges, the end result will be more robust and sustainable.



About Lisa Ricciuti

In 2013, Lisa Ricciuti founded Smart Info Management Services, a consultancy specialized in transforming chaos into clarity for businesses to help them manage their information assets more effectively in the modern workplace. Lisa continually feels inspired by her clients to devise new and innovative strategies to help them work through the never ending deluge of information we all receive daily. Based on strategies she developed (and tested!), she wrote and self-published a book called *The Art of Making Space: Choosing Quality Over Quantity*. Lisa is captivated by why humans are so fascinated with social media and technology. This is a frequent topic for posts on her weekly professional-personal blog, The Deletist, among other topics related to the information age and how humans are affected by it.

For more information visit:

smartinfomanagement.com

thedeletist.com



Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded. Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant. We've always focused on the intersection of people, processes, and information. We help organizations put information to work. AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

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