

# E-mail: Cursed Blessing, or Blessed Curse?

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*I e-mailed you yesterday. Didn't you get my e-mail? What e-mail? When did you e-mail me? OK...I'll e-mail you again. What's your e-mail? I already e-mailed you that! WHAT E-MAIL???* I have entire conversations like that. And unless you're a recently thawed caveman, so do you. At what point did e-mail change from loyal servant to *royal pain*?

I'll tell you exactly when. It was the day someone realized this: that electronic document management systems may have the tippy-top capacity to handle a few million documents, the big ones maybe even tens of millions, but the e-mails created by an organization of 25,000 employees for the standard retention period of seven years would require the handling up to 4.5 **billion** (with a "B") e-mails.

Think about this Zen-like tidbit from Jens Rabe, director of compliance solutions at Open Text: "If you've got 50 million documents in your archive, you have used up pretty much all of the words in the English language in such a multitude that a full-text search is pointless."

To put it into even more context: in early 2004, Google was handling 4.3 billion documents. That's supposed to be the "entire Web." I don't know about that, but the point is, most of us agree that Google is pretty darn comprehensive. Now think about this: according to IDC, more than 9 trillion e-mail messages will be sent this year.

Nine *trillion*.

That's why e-mail is a royal pain. In fact, it's more than royal. It's cosmic.

## What's So Bad About E-mail?

If there was ever a push-me/pull-you, kiss-me/slap-me, love-me/hate-me, more frustratingly *confusing* technology than e-mail, please write me and tell me what it is.

"Unquestionably, one of the biggest collaboration tools is e-mail," states Open Text's Rabe. *OK...so far, so good.* "And it's a **terrible** collaboration tool." *D'oh!* "It's not synchronous. It's not on-line. You always have the wrong, old message, and you don't have the attachment that you

should have. There's no central location for the people using the system. You blow up the requirements for storage space..."

So...it's really bad, is his point...right?

"No, not really." *Oh man.* "It's immediate. You don't have to search for it. It works across company boundaries."

If you're reading this for easy answers, you picked the wrong month.

The very nature of e-mail makes it the target (and at the same time for some, the hero) of the business management theorist. In a way, e-mail subverts the very spirit of collaboration, which is an old Indian word for "works together until happy hour."

E-mail is, in fact, the domain of the cowboy, the shoot-from-hip-sheriff who just rode into town. Only some five years ago (only!) it was still common for companies to restrict e-mail and Internet access from "outside" communications, because it was viewed as an opportunity to goof off, basically.

Not now. Unlimited access and unrestricted communications with anybody, anywhere, is viewed today as an unalienable right and a requirement for doing business. The permission to send an e-mail to any address anywhere is not only common...it's freaking mandatory. Imagine a business manager today issuing a memo—  
to: employees of Gargantuan Enterprise  
re: e-mail

subject: cut it out

It seems almost funny, but..."e-mail has led not only to an extreme acceleration of business processes, but also to an extreme degradation of business processes," says Rabe. In a perverse way, it's almost an etiquette thing. "If you don't reply to an e-mail in the first 24 hours—except for the most complex decisions—there's the impression that you're not paying attention or not working hard enough," agrees Elizabeth Caley, senior director, product management and design at Hummingbird, Ltd. "Then you compound e-mail with BlackBerries," she says "and you get decision-making on the fly."

And why not? Caley continues: "There are those wonderful patient people who DO

spend the time to formulate an entire thought and put all the relevant information in an e-mail. And you'll find further along in the thread that most people haven't even read it."

## It Ain't Easy. It's E-mail

Here are the three intersecting points where Jan Rosi, president of Tower Software North America, says e-mail has managed to converge: 1. "Business has accelerated, so there's an expectation that business will be much more responsive." *Yep, OK.* 2. "It's opened up lines of communications among businesses and their key stakeholders—customers, partners, suppliers...any businesses connected to their business." *Yes, I get that.* "And I guess the third point is that the business commitments made under the first two conditions can now be made in a very informal fashion."

Dang...I thought Jan was going to make it easy. I can't help thinking that collaboration and shoot-from-the-hip decision-making are contradictory impulses. "They ARE competing issues in a way," admits Rosi. On one hand, "e-mail actually facilitates collaboration. It gives you the opportunity to consult, to ask staff and project teams their views and then form an opinion and distribute it."

On the other hand? "E-mail reduces the opportunity for reflection, research and collaboration. It's all part and parcel of being able to do more, faster." See...no easy answers here.

Back in the day, when business was done—quaintly—over the telephone, you'd usually back up your conversation with a proper letter, which summarized your conversation and formalized the agreements reached, price points discussed, compromises reluctantly accepted, etc. But now, boy, that formality (and discipline) is out the window.

The very act of writing a letter forced us to be contemplative, thoughtful and complete. We could review the wording. We often had to get a signature from a boss. We kept a copy, and we expected a similarly formal reply. In other words, there were a lot of damn good, structured, reliable business processes in place that have pretty much vanished.

Hummingbird's Caley adds: "Don't forget the political context. Who do you cc? Who's in the to: line?" Everyone can relate to the ridiculous pressures of e-mail communication, and yet somehow it has been allowed to flourish. Sometimes I think: there oughta be a law.

## There Is a Law

"Communication is a good thing, but what's REALLY driving the market for e-mail management is this: *how much e-mail is legally binding? How do we prove someone said what they said in an e-mail? Is the e-mail legally relevant, or not legally relevant, information?*" asks Open Text's Jans Rabe. Don't know. My head is starting to hurt.

"Companies still haven't come to the realization that e-mail is a corporate record," says Peter Mojica, VP, product management/marketing and business development, AXS-One. "That's a big battle right now. In fact, we've talked to a lot of corporate records managers, and we've heard them literally say that *e-mail will never be declared a corporate record in this company over my dead body*. And yet there can be an e-mail right there that says 'buy 1,000 shares of XYZ Company.' To the SEC, that e-mail is the actual buy order...not the order-entry record," Mojica says.

All the dead bodies aside, isn't it up to the enforcement agencies and regulatory bodies whether or not an e-mail is a record? I mean, a duck is a duck...and a duck with a badge is another thing altogether. And that's just my awkward way of saying: Isn't it true that *enforcement* will drive the move toward compliance, and that companies are watching the news, waiting to see whether or not there are teeth in the laws before they get real serious about compliance?

"I would say that's true," admits Mojica. "But at the same time, the biggest drivers today are the plain-vanilla requirements, where people have no choice but to comply because their auditors say they have to comply." Even the biggest of the swinging-stick customers, like the US government and Wal-Mart, are insisting on a review of suppliers' e-mail management policies in their RFPs. That'll get your attention.

"Keep in mind," adds Mojica, "there's not just risk from internal and external communications. There is now a hyper-sensitivity to the risk involved in keeping something longer than need be. When there's a legal matter, any con-

tent will be subject to legal discovery. And if I have a well-defined business policy and an electronically enforceable mechanism that differentiates between, say, 'tax-related documents I need to keep for seven years,' and 'non-tax-related documents that I can get rid of in 12 months,' I know exactly what my liability is. The policy has to be electronically enforceable, it has to be electronically auditable AND the audit component has to be irrefutable—that's the way a company can protect itself. There are no hidden secrets."

## There Are Hidden Secrets

If there's a continuum that arcs between "unmanaged" and "totally managed," where does the current state of control over e-mail fall in the typical organization? "It's somewhere around 'inconsistently managed,'" says Hummingbird's Caley. "We've had customers ask us to help them, quote, 'manage their e-mail.' And it's such a broad

***"If you've got 50 million documents, you have used up pretty much all the words in the English language."***

question, that we have to ask them: *Why do you want to manage e-mail? What are you trying to solve?*

"The answer falls into broad categories," continues Caley. "First, they want to manage risk. Next, they want to improve individual and team productivity. Finally, they want to improve backend performance requirements," she says. Because, I suspect, they're finding out that Outlook or Exchange wasn't meant to handle this kind of volume. Duh.

"All the vendors—though well-intentioned—went down the wrong path for a little while. We all thought that if you put a collaborative, Web-based 'something' that sits comfortably on your Extranet, wonderfully secure, then people would flock to it. It's a great way to reduce e-mail traffic, it's a great way to make sure the correct people have access to your communications, it's a great way to make sure people work the correct versions of attachments...but it's been amazingly difficult to convince people to get outside of their basic e-mail and use it."

The impression seems to be: if it's not there in front of users' in-boxes, it's not

important enough to take action on. And this implicit urgency of the e-mail (as compared to an "invitation to collaborate") is greater the farther up the professional food-chain you go—\$400-a-billable-hour attorneys and investment bankers are far guiltier of e-mail prejudice than those below them on the knowledge-worker pecking order. (Perhaps we can explore "e-mail envy" as a new social disorder.)

"There's a fork in the road that the industry faces," says Mojica. "Do you focus on the hygiene of e-mail? Or do you focus on the records management aspect of e-mail? We think it's really important to be able to deal with the autocategorization of those e-mail records based on content. Then they can manage both the active content of the records, as well as the retention and disposition—all these things need to be tied together," he argues. "The IT component within big multinational organizations needs to start adapting to a risk-mitigation culture—it needs to become pervasive within their companies. Once they get that culture, they'll find that compliance is just a by-product of everything they do. It'll be built in," he says.

## Risky Business

Jan Rosi may be the relatively new president of TOWER Software, but she's been around the block a few times, as they say. So I believe it when she says that "the information within e-mail is largely unmanaged. The process may be managed—you can put rules around the process, and regulate what you can use e-mail for in an organization, etc. But the actual information within the e-mail is unmanaged.

"Gartner says that something like 50% to 60% of business decisions are being made in e-mail," Rosi continues. "Yet those e-mails are stored on local drives, or shared drives or they're in ill-defined folders stuffed away somewhere. The person who made the decision knows about it, but if that person leaves, how do you pick up the thread? That's where I think the big risk is."

People have unique ways of storing information, especially e-mails. Some have god-awful in-boxes. A disciplined folderer may neatly store everything under folders that make a great deal of sense to...that person. Then he or she leaves the company, and the whole thing goes to hell. "But," Rosi points out, "if you've got a corporate file structure set up, then the framework will facilitate me walking into your shoes if you leave."

Putting aside the unfortunate image of the classy Ms. Rosi even being in the same ROOM as my shoes, much less walking in them, the point is clear: The term is e-mail *management*. Enforcement of a corporate filing structure, and substructures within that

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for various user-classes, is not asking too much. It is, in fact, a lot better than the example of the “full-text search for the whole English language” cited at the top of this article. “It is a proactive analysis of the business, and it does take a lot of effort. But it’s what information managers do best!

“The key thing I see,” Rosi continues, “is to create structure around unstructured information...not just for the risk to the business, but to provide efficiencies to the business, and so that people can find information, share it and leverage it, because as the world has sped up, we can’t just keep re-inventing the wheel. The regulatory factor: that’s something you have to do, but it’s hard to get a business case up on that.

***“The biggest customers  
are insisting on e-mail  
management policies.  
That’ll get your  
attention.”***

“But when you can demonstrate the efficiency and effectiveness of systems such as these, that’s when you really get the buy-in across the organization. The things that we do to create value for the organization will ALWAYS win out over the ‘must dos.’” ■

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Moore has been fortunate enough to cover emerging areas of applied technology for much of his career, ranging from telecom and networking through to information management. In this role, he has been pleased to witness first-hand the decade’s most significant business and organizational revolution: the drive to leverage organizational knowledge assets (documents, records, information and object repositories) to improve performance and improve lives.

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