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Introduction to E-Mail Management and Knowledge Management

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ABSTRACT
E-mail is the communication method of choice in many organizations and is rapidly becoming a key tool of business. We once complained about coping with our paper files; now we do not even know where to begin to handle the rapid growth of e-mail records.

We measured the penetration of e-mail into our work lives by distributing a survey to our constituent groups during 2002 and 2003, including the IFLA e-mail list. 540 members of IFLA from 60 countries participated in this survey.

This introduction describes results of the survey relevant to organizational knowledge management. It looks at e-mail as potential organizational knowledge, describes how we use our e-mail and makes some recommendations for first steps to handling e-mail messages as business knowledge.

E-mail has rapidly become the communication method of choice in many organizations. Meta Group reported last year that over 80% of employees they surveyed preferred e-mail for business communication.(1) As e-mail messages account for a growing portion of business records, this has created personal and organizational management issues such as balancing personal e-mail practices with organizational knowledge management costs, risks and archival record keeping.

This paper primarily focuses on e-mail as a tool of business. It incorporates data from the IFLA survey with lessons from academic and popular articles about e-mail It builds on a session on e-mail communications given at the American Library Association Conference in Atlanta in June 2002 (2) and another on e-mail as knowledge management presented in Chiang Mail Thailand last spring (3). The first session was originally designed to discuss e-mail as a communications tool; however it soon became obvious that the more important issue was e-mail within the knowledge management framework of the organization.

Even though e-mail was not "invented" until 1965, by 1996 the volume of e-mail exceeded the volume of postal mail in the United States (4). It is estimated that 31 billions pieces of e-mail were sent daily in 2003 with the number predicated to go up to 60 billion in 2006 (5), The ease of sending e-mail has resulted not only in praise for e-mail and its capabilities but also has elicited defining words such as "torment", "disaster", "chaos", "foe", and :beast". Probably because of its rapid growth and ease of use, e-mail has been treated informally, considered ephemeral and mistaken as confidential. It is in fact permanent and public and provides a digital record of evidence.

The IFLA survey was administered via e-mail in the summer and fall of 2003 and resulted in 545 valid survey responses from IFLA members in about 60 countries The average number of years using e-mail was nine with a range of two to 28,

Since IFLA is made up of experienced e-mail users, it is not surprising that e-mail is replacing traditional means of communication for a growing number of business applications. We asked respondents how frequently they used e-mail to conduct work functions formerly done by other communications media. The number and percent of survey respondents using e-mail always or often for these activities are shown in Table 1.

Table 1: Uses of e-mail at work

I use e-mail . . .	Number	% Often/ Always
To communicate with colleagues in other institutions	376	69.5
To schedule meetings	317	58.1
In place of phone	308	56.5

To work on projects with colleagues	291	53.4
In place of memos	269	49.4
To communicate with customers	269	43.6
To inform others of new products and services	217	39.8
To solve problems /resolve differences	179	32.9
To send notes with non-work content	168	30.8

Almost 70% of the respondents used e-mail always or often to communicate with colleagues at other institutions. Over half used e-mail always or often in place of phone calls, to schedule meetings, and to work on projects with colleagues, while over 40% used it in place of memos and to communicate with customers. Memos, work on projects, and interactions with users or customers are part of the enterprise's knowledge base.

E-mail is replacing traditional methods of communication without the policies and protocols that accompany written business records. This has implications for the enterprise's knowledge management systems. In order to get a picture of e-mail as both a personal and organizational management concern, we looked at the types of e-mail received and what was done with them after they were read. Each e-mail sent and received in the workplace is an enterprise record.

What employees do with their e-mail after they receive it not only affects them personally, but also has implications for their organization and the organization's knowledge management infrastructure. Respondents to our survey were asked to "guestimate" what they did with their e-mails once they read them. Table 2 shows the percent in each category for this question.

Table 2: What do you do with your e-mail after you have read it? [% in each category]

Storage Activity	Do not do this	>0% to <25%	25% to 50%	50% to 75%	>75%
Delete	2%	29.4%	**30.8%**	25.7%	13.9%
Forward	2.7	**89.1**	6.3	1.7	2
Print	4.6	**78.5**	12.1	3.8	1
Save on e-mail	2.6	**47.1**	28.3	16.9	5.1
Save on computer or disk	17.1	59.4	15	7.3	1

Only two percent did not delete at all and about 40% kept all of their e-mails. The disposition of the non-deleted e-mails varies. The top choice was "Saving on e-mail."

 IFLA respondents reported forwarding only 10 percent of their e-mails. Forwarding can result in exponential growth of e-mails and much of what people forward is often not business related. A friend sends us a message to our business e-mail and asks us to send it to 10 people.. By the fourth time it is sent the one e-mail has grown to 10.000, wasting

time, bandwidth and storage space. Storage and time alone are not the only risks to forwarding.   Forwarded e-mails may be edited, losing the original written record; e-mails may also be forwarded without the original sender's approval. These practices compromise the authenticity of the e-mail record.

Junk mail and viruses impact an individual's efficiency and the organization's costs. Since our survey was administered during 2003, it does not reflect the rampant rise of spam or junk and the number of viruses that have been plaguing e-mail users this year. Current estimates are that junk mail is growing at a rate where it is approaching half of the e-mail that is sent and the marketing firm Jupiter research predicts that an active e-mail user will receive about 4,000 pieces of junk mail this year (6). As individuals we are annoyed by junk mail and the time it takes to identify it and delete it.   The costs to our organizations are much higher as information systems departments need to provide extra storage just to receive it and special software to filter for it.

Viruses are another personal and organizational e-mail issue. One virus can crash a single computer or bring down entire systems around the world. Viruses create computer malfunctions, contribute to declining productivity and result in the loss of valuable information.   Worldwide estimates of the cost of viruses are 28 billion $US in 2003, rising to $75 billion in 2007 (7). In addition to the costs of the virus are the costs to the organization of anti-virus software

Individual Best Practices

There are actions that individuals can take to better manage their own e-mails without putting their organizations at risk or jeopardizing knowledge management initiatives.

- Only put into e-mail opinions or thoughts you would have put into a business written memo or letter. Omit confidential information.

- Do not send bad news or information that is open to misinterpretation.

- Only send e-mail to the person in the next office space if you want it to be a permanent record.

- Get a second, free web-based e-mail account for personal mail and use that address when you need to register for sites. This will not only keep your personal mail separate from work but will reduce the amount of junk coming to your business account.

- Do not open attachments from unknown people; do not even open unexpected attachments from colleagues and friends.

- Think about how you dispose of the e-mail you receive.

Implications for Knowledge Management

Deleting, forwarding, and saving all have implications for managing knowledge assets and also for creating risk. Deleting seems positive from a personal management perspective and from a system's storage perspective. However, it has implications that need to be examined for both records management and organizational risk. Storage involves the cost of storage for the organization and the cost of retrieval for the individual, while forwarding may involve both a storage and time cost. Deleting e-mail from a mailbox does not mean that it has been deleted it from a system.

Effective E-mail Management for Knowledge Management: Organizational Best Practices

Just as there are steps that individuals can take to improve their personal e-mail management, there are steps an organization should take to create an e-mail knowledge management system.

- Conduct an e-mail audit. Determine how your employees are currently using e-mail and use this as a basis to create an e-mail policy.

- Create a written e-mail policy that addresses both e-mail usage and e-mail archiving. Involve individuals throughout the organization. Include not only information technology staff but also people with records management, archiving or at least library organization experience.

- Consider the legal and regulatory environment of the organization, industry and country in the archiving and retention policies. These considerations may shape the rest of the policy. It is necessary to determine what needs to be retained, how long it should be retained, and what level of access is necessary.

- Communicate the e-mail usage policy to management and employees

- Enforce the e-mail usage and archiving policy.

Conclusion

E-mail is a growing source of an enterprise's records and needs to be treated as any written memo, letter or report has been treated. The information in e-mail has the potential to add to the enterprise's knowledge assets, from interactions with the users or customers in the enterprise to interactions with colleagues overseas. E-mail systems were not created to support records management. It has become necessary for organizations to consider not only e-mail but other newer technologies such as fax, voice mail, and other digital records as part of the corporate history that requires permanent capture and organization. Even if you are not in that phase of the e-mail cycle where "foe" better defines your relationship with e-mail than "friend", effective e-mail usage and archiving policies, in line with the enterprise's legal, regulatory and business environment are necessary.

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