

The Complete Guide To

Email Management for Law Firms

What Law Firms Need to Know
About Managing Their Emails

The Complete Guide to Email Management for Law Firms

Managing email is simple for a solo or small law practice. However, as your practice grows, so will the volume of documents, content, and email. Simple email management practices that worked before are often outgrown as law firms evolve. In this article, we'll walk you through how to bring law and order to your law firm email management.

Introduction to Email Management

Email is a core component of nearly any business, including and especially law firms. Email software (such as Outlook or Gmail) tends to be good at sending and receiving email... but often gets used by lawyers and legal professionals to handle other tasks, such as:

- Storing/sorting emails (perhaps by client, matter, or project)
- Searching for emails (sent or received earlier)

As a result, your [email inbox](#) becomes a defacto part of your client/case

management system. The problem is: *Email clients were never made to serve this purpose.*

Typical email management challenges within law firms include:

- Storing emails can become a hassle, especially when everyone in your firm does it differently.
- Finding an email from a client may require time spent searching that you could be using for something else.
- Emails that fail to make it into a folder could result in serious miscommunication between your firm and your clients.

Properly managing, storing, organizing, sharing, and referencing emails is difficult, but critical for law firms. In this guide, we'll discuss what email management is, why it's important, what you could be doing wrong, and how to fix it all.



Why Is Email Management Important for Law Firms?

According to numbers published in Adobe's [Email Usage Study](#), consumers spend approximately 5 hours a day checking work email. From client communications to regulatory updates, your inbox is home to critical information you need to run your firm.

Unfortunately, your inbox can quickly become disorganized. Critical conversations can accidentally get deleted while important documents can be lost deep within threads. Searching for this information is time-consuming and, if you bill by the hour, a drain on your bottom line.

Email Management Challenges

Or: "The problem with Email Software for *Managing* Email."

Matter Information Segregation

Email lives in its own closed system such as Outlook or another email software or service. When you're having a conversation with a client on a

particular matter, this conversation and its attachments are stored inside your email. All of the other matter-related information, including documents, case notes, and matter data will be somewhere else. Unfortunately, this segregation of information results in inefficiency, wasted time, and potential for serious mistakes.

Not Centralized, Not Shared

Are there other team members inside your firm working on the same case? If so, you all might be conversing with clients or colleagues via email regarding the case. While you might be great at saving emails to a specific Outlook folder, the other people working on this matter may not know you've spoken with a client at all. Email, on its own, is completely decentralized, which leads to a lack of transparency and (often) duplicative work.

Individualized Organization

With standard email, you are left to your own devices when it comes to developing a system for keeping your emails organized and sticking to it. While Outlook and Gmail may give you tools such as folders and tags, it's up to you and your team to use them. And even if you're diligent about perfectly

organizing emails by folder, tags, or both: there's nothing ensuring the *rest* of your team does the same.

Search Difficulties:

Searching for email with built-in email software is hit or miss. For example, the Outlook search index is prone to breaking which can make searching slow or impossible. If you need to search your inbox for a client document, it may take valuable time to do so. Law firms require rich search features to ensure every file pertaining to a specific keyword, whether contract or simple client email, shows up. Standard email software can't deliver on this need. What's more, oftentimes you may not be sure if the thing you're searching for is in an *email* or a *document*, and you'll need a way to search across both.

OCR Challenges

Optical character recognition (OCR) is critical for firms that frequently use PDFs. If you've ever emailed a scanned PDF document, opened it, and noticed you can't select, highlight, or copy any of the text, you know the importance of OCR. This process converts the scanned document into a full-text document. If a document isn't OCR'd, it's not easily editable and won't be found in search.

Unfortunately, without the right email management, you and your team will need to manually OCR every PDF file yourself, leaving room for error and missing documents.



Benefits of Email

Management for Law Firms

Luckily, there are tools available to you to help you meet these challenges head-on. Specifically: *Email Management*.

[Email Management](#) functionality is a subset of *Document Management* functionality, often found in a Document Management System (DMS).



Related: [Best Document Management Software for Law Firms](#)

Why Your Firm (Probably) Needs a Proper Email Management System

Centralizes All Matter-Related Data

An email management solution (coupled with a document management system) will keep all of your matter-related data together in one place. For example, [LexWorkplace](#), a full law firm DMS, organizes case documents, emails, and notes into tabs for easy access. When you need to find a file, it's readily available, boosting your productivity and eliminating mistakes.

Simplifies Sharing Of Matter- Related Data

Email management enables you to store emails in a single, centralized database that's accessible to your entire firm. When one user saves a relevant email to a specific matter, the rest of the firm working on it can see and access the email along with any other documents or data. This ensures everyone is on the same page, which means you can better serve your clients and improve efficiency.

Removes The Need to Manually Organize Your Files

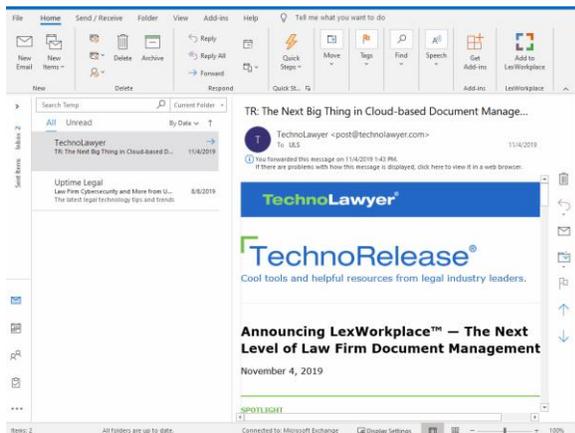
An email management system will do the organizing for you. There's no need to manually create an Outlook folder or Gmail tag for every new matter. Instead, in most email management tools, you can automatically save emails right to a specific matter or client. And better yet, all emails are saved to the same place, regardless of who saves them.

Enables Fast and Efficient Search

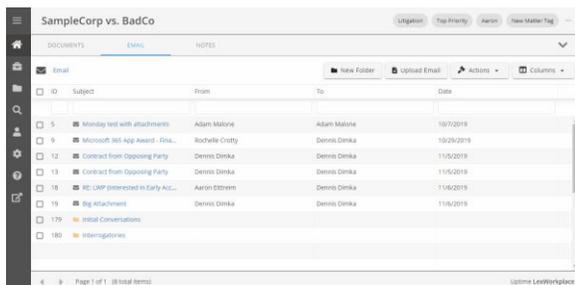
In a law firm email management system, indexing is done by the software. The tool crawls and indexes

every email and document you store so you can quickly search for a phrase and find what you're looking for. These search features are typically much more robust than those offered through standard email. You can count on your search to work every time, regardless of the user.

By way of example, LexWorkplace allows you to save an email directly to a specific Matter (via its Outlook add-in).



Next, you can further organize emails within a matter into subfolders, just like you would within Outlook.



Now, all important emails for this matter are (a) accessible to your entire team, and (b) live alongside documents for the same matter.

3 Ways You Might Be “Managing” Email (And Why You Should Stop)

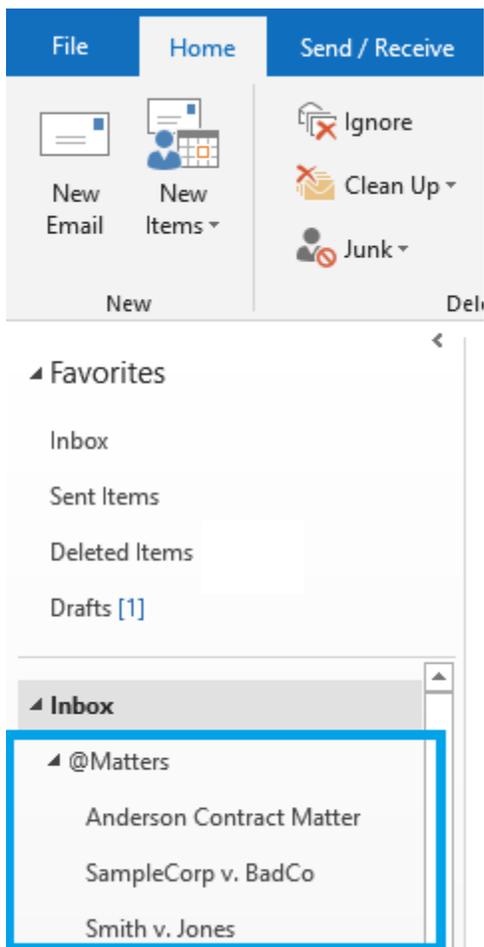
“But wait, I do store my emails and it’s been good so far.” We hear you. But after speaking with so many attorneys through the years, we know that most email storage methods are simply subpar when it comes to true email management. Let’s discuss the 3 methods law firms typically use to store their emails and why they simply don’t work.

1. In Outlook with Folders

Perhaps the most common way of “managing” emails is simply using folders inside Outlook. It requires each individual team member to manage their own emails inside their own inbox. We’ve found this to be the default way for most firms.

Using this method, new folders are typically created for each new client or

new matter. Unfortunately, this leads to all emails now being decentralized as each member of your team will have their own separate folders. They're not shared with the rest of your team and are often duplicated, leading to a disjointed and fragmented mess.



Furthermore, all of the emails are now saved inside Outlook or Gmail while other documents are saved elsewhere in a separate system. Using this method, locating all matter-related information

is a tedious process that often results in mistakes and unnecessary frustration.

2. Saving Emails to PDF

Some law firms try to avoid disparate systems by saving all emails to PDFs and then storing them with the rest of their legal documents. Unfortunately, saving documents to PDF is a clunky and time-consuming process. And that's if you and your team remember to save each individual document from every email in the first place.

3. Saving Emails to Practice Management Software

Some Law Practice Management applications have *rudimentary* email management, allowing you to save emails to a matter, or CC/BCC a special address to file a copy of an email in your case management software.

While doing this is better than trying to use Outlook folders to manage email, we find that Document Management Systems are almost always better suited for managing email. Most case management apps, even if they allow you to save emails to each matter file, often lack the ability to search through documents and emails effectively.

Indexing is clunky and makes finding your critical documents tough. And, in a busy law firm, even a few minutes spent searching for a single file is too long.



Related: [Practice Management vs. Document Management Software](#)

Practice Management Software (Usually)

Isn't Enough

You may also have practice management software you use to help organize your matter materials. That's a good thing. Plus, it may even have a few email management features. For example, they may allow you to copy an email to a case within the case management system.

Practice management software isn't enough for most firms. The email management features are typically

rudimentary. The email integration process is often clunky and requires you to set up a clumsy email forward to get emails into the system. And these systems often copy the content of an email rather than the full email in its entirety, leaving critical information behind.

What Is an Email Management System (EMS)?

The bottom line is this: "default" tools such as Outlook, Gmail, or even your practice management software is often ill-suited to managing matter-related emails in a central, organized way.

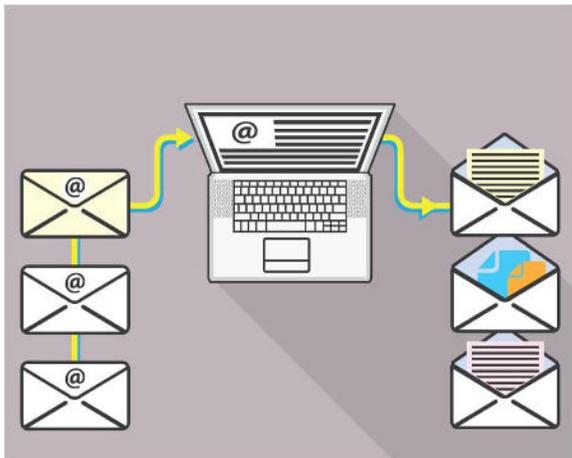
Law firms should implement an email management system (EMS) as part of their legal technology toolkit. Again, an Email Management System is usually a subset of functionality within a broader Document Management System (DMS).

An EMS helps law firms store, organize, manage, and find emails quickly. For law firms, a good EMS will save emails to each matter, alongside other files and content related to a specific client or case.

How Does an EMS Work?

In most cases, an EMS works by integrating with your existing email software such as Outlook. As you sift through your email, the management tool will allow you to save emails to a matter or client from the same screen.

Typically, an EMS is best used as a key feature inside of a document management system (DMS). We'll discuss this a bit later.



Features of an Email Management System

To get a true picture of what an EMS does when compared with default tools, it's best to take a look at the features. Any solid law firm email management system should offer:

Matter-Centric Organization

Emails should be stored based on the matter or client automatically. Your EMS should store emails alongside other matter-related documents and content, so everything is in the same place for easy access and collaboration throughout your firm.

Cloud-Based Storage

A cloud-based solution prevents you from needing to deal with costly servers, IT issues, and storage requirements. Plus, you'll be able to access your email management tool anywhere at any time without the need to update or maintain your software (the vendor will do that for you).

De-Duplication

Did a client send the same email to multiple team members? An EMS will include de-duplication to eliminate duplicate copies of the same email automatically, saving you time and headaches.

Rich Search Capabilities

An EMS will include a powerful search engine much like Google. Using a few

keywords, your EMS will search through all of your emails and attachments, so you can find the document or client conversation you're looking for fast.

OCR Capabilities

An EMS will automatically perform OCR on PDFs and save the new file into your system. This means you're able to use the EMS search functions to even find specific PDFs. There's no need to OCR manually.

Full Email Storage

An EMS will store your emails in their entirety, including message headers, body text, images, and all attachments. This ensures nothing is missed.

Simplified Integrations

When it comes to email management, integration with your email service is critical. An EMS will offer simplified integration with services such as Outlook and Gmail and will also work regardless of operating system. It will also enable you to save files from your email or from your local file system (EML file).

Security

Any time client information is stored it must be done so with heightened security. An EMS will have bank-grade security, including encryption so you can trust that your data is safe.

The Basics of Using an Email Management System Within Your Firm

Whether you're ready to implement an email management system or want to upgrade your current system, there are some basics you should know first.

Find an EMS That Works with Your Current Tech Stack

First, you'll want to find an EMS that works with your current tech stack. There's no reason to completely overhaul your entire system so long as you find an EMS that integrates seamlessly.

For example, if you use Outlook and other Microsoft tools such as Office 365, you'll want an email management tool that integrates with Microsoft tools. If you use Gmail, it should have Gmail

capabilities. Point blank, if the EMS can't connect to your email, you must find another option. This is a critical function for your EMS to work properly.



Related: [How to Use Office 365 for Law Firms](#)

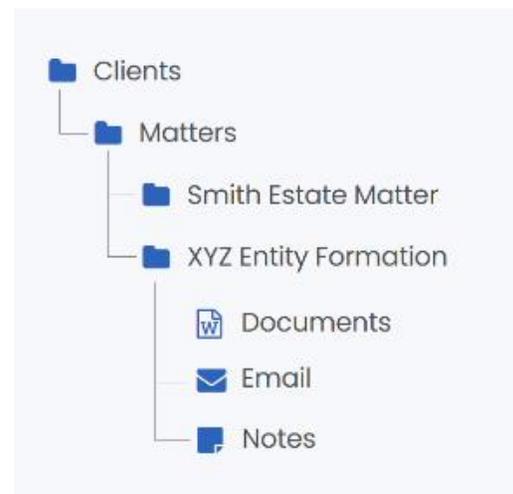
Integrate, Integrate, Integrate

The next step is to integrate your EMS with your email service. Don't let this step scare you. The good news is that most EMS vendors will provide assistance with this process. And it's typically as simple as signing into both accounts and clicking a few buttons.

A quick note: While considering your EMS options, it's important to consider which vendors offer [support](#). If you need help during setup or something goes awry when trying to use your EMS on a random Tuesday afternoon, you'll want someone to reach out to for help.

Organize Folders by Client or Matter

After integration and setup, you'll want to start organizing your emails. We recommend creating individual folders inside your EMS for each specific client or matter. Go ahead and set these folders up for your active clients soon after you integrate so you can get a jump on your email management.



As you take on new clients, you can simply add new folders. Most EMS options will allow you to do this right inside your email. This makes it easy to organize from the email instead of going in and out of multiple tools.

Migrate Stored Emails to Your EMS

If you're currently storing your email elsewhere, you'll want to migrate those files to your new EMS. This ensures you're able to access all files in the exact same way. While this step can be tedious, your EMS vendor should be able to help you with the migration process.

Consider Using an Email Archive Tool

Want another layer of storage to ensure you never lose an email file? Using an email archive tool is a great option. These tools store a copy of every email ever sent or received to or from anyone in your law firm. If you forget to save an email or you accidentally delete one, these tools will stand in the gap.

There are various email archive options out there, including [Microsoft Exchange Online Archiving](#) which works seamlessly with Outlook.

What Is a Document Management System (DMS)?

While some solo or smaller firms can benefit from an EMS tool, others need more. For these firms, we typically recommend that you instead opt for document management software (DMS) that delivers email management as a key feature versus a standalone email management tool.

A [DMS](#) is a tool that not only stores your law firm's emails and documents but provides robust tools to find, organize, and manage them. A DMS can be either cloud-based or on-premise (although we don't recommend going that route).

We're not talking about OneDrive, Google Drive, or Dropbox here. We also don't mean your S: drive or your basic practice management app. A law firm DMS is a complete management system designed to help you keep track of every critical file your firm needs to complete your important work.



Related: [Document Management vs. Basic Cloud Storage](#)

Features of a Document Management System (DMS)

Of course, a DMS will include robust email management features such as the ability to save emails to specific matters straight from your inbox. However, there are other features included inside a DMS that will greatly benefit your firm:

Full File Storage

A DMS will store all of your documents, not just emails. This includes everything from client intake documents to contracts and beyond. A cloud based DMS is the best choice as it enables you to access your files from anywhere.

Document Profiling

You can apply attributes to your documents, including document classifications, types, and tags for easy indexing. Plus, a DMS will give you the ability to add notes to documents for additional information.

Full-Text Search

You can search across documents and email. Search results will contain everything from filename to metadata and document content.

Document Check-In/ Check-Out

To avoid you making changes to a document at the same time as another member of your team, you can check documents in and out using a DMS. While you're in the document, no one else can edit it as it's locked until you're finished.

Version Management

A DMS will automatically create and track document versions so you can see what has changed and when. You can also revert to specific versions to easily fix mistakes if required.

Permissions And Access Management

You can permit or restrict certain access to particular matters, documents, emails, and more. This is great for when you must collaborate with colleagues outside of your firm.

Full OS Compatibility

A DMS will work regardless of operating system, including Windows and iOS. It will also work across devices with mobile functionality for easy access to your work when you need it.

Security

A DMS will feature robust security features, including end-to-end encryption in transit and at-rest for optimum protection.

How Much Does a DMS Cost?

Good question. And the answer is it depends. Different DMS vendors will require different payment plans. For example, you may be required to pay monthly per user or annually per user. Using LexWorkplace as an example,

the [base package](#) starts at \$395 per month for up to three users.

The cost will depend on the size of your firm and your needs. The good news is that although a DMS is an investment, it can save you money in the long run. After all, efficiency matters in a busy law firm.

Why Your Law Firm Might Need a Document Management System

Not sure if you need to upgrade to a DMS? There are several reasons why it might be the best move for your firm:

Your Files Are Everywhere

Do you have multiple folders for the same client? Or duplicate files across matters? If your files are strung across multiple storage areas and folders, it's time for a DMS.

You're A Rapidly Growing Firm

Files and folders can start out organized enough. However, as your team and business grow, saving, managing, and finding files saved in basic storage can

quickly become overly complex. More clients and more hands inside your files mean more clutter. And you'll need a management tool to keep from pulling your hair out.

You're Spending Too Much Time (And Money) On Basic Tasks

Are you spending several minutes trying to track down a single file? Those precious moments add up over time. Plus, you could be spending that time serving your clients or performing growth work for your firm.

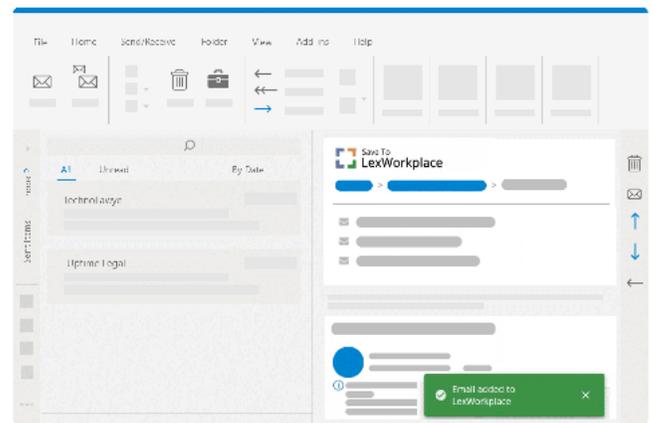
Your Remote Team Can't Find the Info They Need to Do Their Work

If you're working remotely or have team members who work from home, document management is even more important. Everyone should be able to find the files they need to do their critical work fast and from anywhere. You can't do that when you store your files in a folder on your computer.

LexWorkplace: Modern Email Management for Law Firms

If you're looking for a complete document management system that includes robust email management features, [LexWorkplace](#) is an excellent choice. LexWorkplace was built specifically for law firms that need matter-centric document storage and management tools.

Email Management for Law Firms Inside LexWorkplace



LexWorkplace enables you to save emails right to a matter file from within Outlook. These emails can then be shared, reviewed, and searched by your entire team using the simple interface.

Email messages and their attachments are then indexed and completely searchable using the built-in search engine. You'll be able to view and open emails from inside your matter files as they're stored right next to your documents.

LexWorkplace automatically removes duplicated emails to prevent storage overload. Plus, you can open, forward, and reply to emails from right inside LexWorkplace. It's truly the complete package for managing your critical files and emails.

View, Store & Manage Your Emails All in One Place with LexWorkplace

Managing your firm's emails shouldn't be a hassle. Instead, LexWorkplace, the law firm document management system, can help you ensure your critical emails and documents are at your fingertips when you need them.

To learn more about LexWorkplace, [reach out to us](#) today.