



Retention Managed Email at an Energy Company

Manage Email Retention Risk and Email Volume

EN, an Energy company, explores, produces, and sells oil and natural gas. EN is engaged in complex, expensive, and geographically distributed projects; health, safety, and the environment are high priorities; and asset sales and purchases are common. These factors all require EN to carefully manage its

information and communications. In particular, EN needs to retain email for internal operations, litigation, and compliance purposes. EN is using Trusted Edge's Software to manage email retention product to manage its email to business objectives.

BACKGROUND

EN, an Energy company, explores, produces, and sells oil and natural gas. These projects are very information and communication intensive, as they are complex, expensive, and geographically distributed. In addition to operational value, the information may relate to health, safety, and environmental issues, and must be retained from a regulatory and litigation perspective. EN also acquires and sells energy assets, and information about these assets must be managed. EN has developed policies for information management that allows it to operate efficiently and responsibly. EN needs to implement these policies across all of its information silos, including email.

PROBLEM

Email presents a particular challenge for EN, for both retention and discovery. EN estimates that only 15% of emails need to be retained for any significant period of time, so email archiving through journaling, which keeps all emails forever, would retain too much information for too long. Keeping all emails forever complicates decision making (too much noise) and makes eDiscovery more expensive (more emails to search through). Selective email archiving by end-users dragging-and-dropping each important email into the archive, is viewed by employees as onerous and undirected. EN needs an email management solution that helps employees manage their emails according to corporate policy, while not disrupting the way employees do their jobs. The solution must be comprehensive and unobtrusive.

SOLUTION

EN chose to deploy Trusted Edge's Retention Managed Email solution across all of its employees' PCs. Retention Managed Email intercepts all emails as they are sent or received and, by policy, engages in an interactive classification process with the email sender and recipient to acquire additional information (meta-data) about the email. The system then automatically retains only those emails that, by corporate policy, should be retained. The retained emails are archived in a location under corporate control. The entire retention managed email process is managed through centralized policies. Retention Managed Email operates equally well online and offline, so emails and their meta-data are automatically archived whether the employee is working at his desktop on the corporate network, or at his laptop while on an airplane.

EN's email retention policy states that employees are obliged to identify emails they send or receive as being in one of several corporate classifications. These classifications include both a "Draft" classification (which includes non-final business emails and personal emails) and several classifications for final emails (e.g., sales, marketing, research, etc.). "Draft" emails are not archived, and are purged from the Email server after 60 days. Unclassified emails are treated as "Draft" and are also purged after 60 days. Final emails are archived in EN's repository organized according to each email's classification.



EN uses Trusted Edge's Retention Managed Email solution to enable users to instantly classify emails that they send, as they send the email. This Classify-on-Send process works in two ways: For the 85% of emails that are "Drafts," the email sender clicks a "Send-as-Draft" button instead of the "Send" button. The email is marked as a "Draft," is sent normally, and is automatically managed to a 60-day retention schedule at the sender and all recipients. For non-Draft emails, the sender clicks the regular "Send" button, and a short list of radio buttons appears that present the user with the list of "Final" classifications that he typically uses. After selecting the classification, the email is sent normally and is automatically archived and managed to the business lifetime for the selected classification.

The classification the sender chooses is attached to the email, and is visible to senders and recipients of the email within their email client. By classifying emails on-send, emails are selectively archived according to corporate policy, and recipients do not need to classify any previously classified emails that they receive. EN chose to deploy Retention Managed Email with discretionary Classify-on-Read, whereby recipients of an email can choose to classify an unclassified email (e.g., one received from a sender outside the enterprise), or to reclassify an email. Emails that are Classified-on-Read are also automatically archived by the system.

EN chose Trusted Edge Retention Managed Email for three reasons:

- ◆ First, email capture and classification policies are centrally managed.
- ◆ Second, the emails can be archived to any location, including within the Email Server itself, and to File Servers, Email Archives, and other ECM systems, allowing EN to leverage existing IT infrastructure.
- ◆ Finally, non-discretionary interactive classification is the least intrusive way to acquire the necessary meta-data from the email sender to automatically drive the selective archiving process. So emails are selectively archived and risk is managed.

RESULTS

By deploying Trusted Edge Retention Managed Email, EN is confident that it is managing emails according to its retention policies. These policies require that users participate in the classification process, and non-discretionary interactive classification makes this process efficient. By keeping only those emails that need to be preserved, EN addresses its needs to preserve information for operational and regulatory, and compliance objectives. This lets EN manage its retention risk and greatly reduce its discovery costs, since the size of the email archive is reduced.

CONCLUSION

EN is using Trusted Edge's Retention Managed Email solution to solve its email management objectives. EN intends to refine its interactive classification process to further simplify the choices that users select from, as well as to collect more meta-data, as appropriate, to improve information sharing and collaboration, and to leverage Retention Managed Email's capability to file information automatically based on the meta-data collected.

Improving the quality of email that is kept, through the elimination of non-essential email from the Archive reduced EN's email archive storage consumption by 85%.