



transforming business by transforming e-mail

Whitepaper

E-mail Productivity Best Practices

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*“The older I get the more wisdom I find in the ancient rule of taking first things first.”
-Dwight D. Eisenhower*

1. Introduction

Digital communications has changed the way we interact. The commercialization of e-mail was first hailed as a great time emancipator. No longer would people have to waste time trading phone calls to arrange meetings and coordinate schedules. Nor would they spend valuable time on mundane tasks including assorted document preparation to be sent by mail or overnight services. Moreover, they would significantly reduce time to share ideas and feelings with colleagues and friends. Asynchronous communication in the form of e-mail introduced many new opportunities for communication within and between individuals and organizations and their constituents. It did not take very much time for e-mail to be integrated into everyday business processes. Quite cost effective and fast, what was not to like about e-mail?

Unlike mail where typically a person would attempt to concentrate as much information as possible into a letter or package, the virtual nature of e-mail permits sending less information more frequently. What started as an alternative format, e-mail has become the defacto standard for communicating. So much so that it is estimated that employees spend over 41% of their time managing e-mail.

It is not clear when e-mail morphed from this time emancipator into a ‘necessary evil’, but the impact of annual double digit growth in e-mail volume is now raising alarms for individuals and management. E-mail is now considered to be among the top productivity killers in the work place [Radicati, IDC, Others]. Significant time is wasted and/or lost at the individual, team and enterprise levels as a result of individuals constantly surfing through mailboxes seeking to find and manage important e-mail and the ensuing delays that result from these activities.

The ‘time spent’ cost is only part of the problem. What we call the ‘action cycle’ is also impaired. Time to completion’ is impaired i.e. time-to-market, time-to-decision, time-to-respond are eroded when individuals are faced with sorting, prioritizing and managing ever increasing volumes of e-mail. Important e-mail is missed and unimportant e-mail is viewed. Approximately half of all e-mail received are not important. Yet substantial time is invested in parsing e-mail.

These issues are further complicated by organizations that are mobile, virtual, decentralized and geographically dispersed. Collectively, the costs associated with spending time working on

e-mail (i.e. filing and storing e-mail data) and the time pressure ‘needs to be done sooner’ have created a need to manage e-mail more effectively at individual, group and enterprise levels.

Firms are approaching these issues in a variety of ways. Some firms are looking to create policies that help manage the amount of e-mail generated and how it is organized (which in itself can be very time consuming). Training on how to manage e-mail can be very effective on an individual basis but may not work as well at group or enterprise levels if all people in the group have not been trained or do not adhere to what they have learned. Regardless of the level or extent of training, the volume of e-mail can feel like a ‘tsunami’ and leave an organization ‘unprotected’ and less productive or effective.

New technology is required that helps individuals and their organizations measure and manage their e-mail, workflow and changing priorities in a simple and unobtrusive way while at the same time complying with privacy policies and laws.

Leading global firms are deploying new technology (such as “E-mail Dynamic Prioritization and Business Intelligence” created by MESSAGEMIND) in conjunction with training on e-mail best practices. Results include enhanced productivity, faster decision making and innovation, and increased customer satisfaction.

2. Scope

The challenge of managing e-mail overload is to follow the advice of President Eisenhower cited at the beginning of this paper. He went on to describe the ancient rule as “a process which often reduces the most complex human problem to a manageable proportion”. In the case of e-mail overload it means to:

- a) Help users to dynamically prioritize e-mail.
- b) Provide users with the ability to easily prioritize their e-mail on all devices including smart phones.
- c) Create an intelligent mechanism to ensure that individual user priorities are consistent and shared with the team & company priorities.
- d) Provide workflow capability that fits with the way people work.
- e) Set productivity goals.
- f) Permit users to see their metrics and compare them with groups and the company as a whole, while complying with privacy policies and laws.
- g) Provide targeted and focused training based on the data gathered.

These steps should be accomplished in a way that is automatic, unobtrusive, and easy to use for end users and that comply with company privacy, HR, legal and security policies (we are not aware of any other software except Messagemind™ that can meet all of these requirements). Most existing products and services are typically complicated, difficult to learn, and not responsive to change.

This whitepaper explores best practices & technologies to manage e-mail overload in corporations and government agencies.

This paper provides a general framework with the understanding that individual business needs may vary depending upon industry, department, function and the nature of an individual's job.

The analysis is based on the authors' experiences advising large institutions on e-mail productivity technology & best practices. The best practices described in this paper can be automatically implemented using software such as Messagemind. Individuals and companies can also apply these practices manually; however this may take a significant amount of time and training.

This white paper touches on key elements of how to measure e-mail productivity, key quantitative & qualitative analytics, measuring return on investment (ROI) on e-mail productivity initiatives, extracting actionable business intelligence from company's e-mail, evaluating different technologies, and case studies on implementing such best practices and technologies.

3. E-mail Productivity Concepts

3.1 What is E-mail Productivity?

The expression 'e-mail overload' is believed to have been coined in a paper presented by Whittaker and Sidner in 1996. Their premise was that e-mail, 'the most successful computer application ever devised (at that time), was being used beyond its design as a communication/collaboration tool. Its functionality was being stretched to include task management and archiving with resulting complications for personal information management – hence, e-mail overload.

Fast forward to today and the situation is significantly more complicated. E-mail volume has exploded, but until recently e-mail management technology has not improved significantly to either manage the volume or provide the extended functionality; and the volume is expected to worsen significantly. Last year Radacati Group estimated that global daily volume of 210 billion messages will double by 2012.

The e-mail overload problem has become so severe that the discussion of methods to mitigate e-mail overload often supplants discussion of the true goals of how to increase individual and group productivity, and provide actionable business intelligence to improve decision making. Reducing e-mail overload is important, but it is one of the means to achieve the goal, and not the goal itself. With that in mind, we focus on “E-mail Productivity”, and then “E-mail Overload Management”.

We break down E-mail Productivity into two components, your “efficiency” and your “effectiveness” working with e-mail. We look at three areas to evaluate e-mail productivity:

a) Decision-making metrics measure the efficiency and effectiveness of a user’s decision on actionable e-mail. The components of this activity include identifying actionable e-mail, converting these e-mail to action, planning and completing the action.

b) Processing Metrics measure the efficiency and effectiveness of a user reading e-mail received in the mailbox and manual housekeeping (e-mail filing, archiving, and deleting unimportant e-mail) operations performed by the user. The objective of these metrics is to provide information on how much and what percentage of the user’s time are spent reading messages, and whether the more important messages are read before the less important messages. Most of the house-keeping should be automated saving time for the user.

c) Communication Metrics measure the efficiency and effectiveness of the user’s communication with other people. The objective of these metrics is to provide information on how much and what % of the user’s time is spent replying to important messages, and whether the more important messages are replied to before the less important ones. These metrics also help measure the collaboration trends, which is the amount, speed and relative importance of new information the user is generating and sending to others and how others treat e-mail when received.

3.2 What is E-mail Prioritization?

We often interchangeably use the terms “Goals”, “Objectives”, and “Priorities”. We define the differences as follows: “Goals” are defined as specific targets to be achieved by specific dates. “Objectives” are intermediate targets with shorter time frames needed to achieve a specific goal. Priorities are “Objectives” that have been ranked in order of importance. By these definitions an individual’s most important and urgent objective is the top priority [reference: The Time Trap, Third Edition, by Alec Mackenzie]

In principal, an individual's goals are driven by their organization's strategic goals and in turn their business unit and/or department goals. Establishing specific goals is a critical component for establishing priorities, which in turn helps determine how you and your workforce should spend time.

Extending these concepts to your e-mail helps align your actions with your goals. E-mail priority is a function of importance and urgency to your goals (individual goals and company goals). By assigning a coefficient representing importance and urgency, it becomes possible to assign priority. Processing e-mail with the highest 'coefficients' of importance and urgency will give you the "highest rate of return on your time" and hence should be assigned the highest priority.

3.3 E-mail Productivity Vs. E-mail Prioritization

A person's e-mail productivity (efficiency component) is highest when e-mail is handled in order of priority with the 'most important' e-mail handled first. While this seems to be a common sense and obvious approach, translating this practice into action when your mailbox is full (and growing) is not so easy.

For example, let's say you are a senior business development manager and you received three new e-mail in your inbox:

- a) An important customer requesting a new service proposal.
- b) Your human resource department requesting you to confirm your training needs for the next year.
- c) One of your best friends sending their "vacation photos".

Which e-mail has the highest priority? For most workers, customer e-mail would have the highest priority over the other two e-mail. If you read the customer's e-mail first, and you take action and respond to it first – your productivity will then be the highest.

Another important consideration is how your productivity impacts the productivity of the people you work with - your subordinates, your peers, your managers and your customers. What would be the impact if your response to the customer was delayed because of a cluttered inbox? Now apply the example described above to the 100+ e-mail a day that the average knowledge worker receives and we have the making of much time lost from first finding the e-mail and then deciding how to prioritize it.

In a nut shell, e-mail productivity (efficiency component) is largely a function of e-mail prioritization and the ability to effectively and timely assign priorities regardless of e-mail volume; and it is imperative that the prioritization is well understood by the user and that this prioritization is consistent with the group and the company's priorities.

E-mail Productivity Best Practices

Messagemind is the only enterprise technology providing analytics and reports that measure individual and group e-mail productivity levels, and provides the basis to help align individual and group priorities.

4. E-mail Productivity Best Practices

Now let's look into some best practices to boost your productivity and that of your workforce. Let's explain with this concept the three hats we wear when we work with our e-mail.

In other words, we switch back and forth in one of three modes when we work with our e-mail: Read Mode, Plan Mode, Work Mode. The important productivity secret is to learn how to be attentive to your active mode and use it and the tools to boost productivity.

Let's begin with the "Reading Mode".

4.1 Reading Mode: Prioritize and Compartmentalize

"Reading mode" is the first step. We are in reading mode when we check Outlook or our smart phones for new e-mail. In this mode our objective is to identify important e-mail, read important e-mail first, and to not get distracted by unimportant e-mail. The important productivity practice here is "Prioritize your e-mail reading". When this is done properly, you will read your e-mail in order of its priority and not in the order in which it was received in your mailbox.

There are two methods that can be used to implement this practice: A manual method or by using software that assigns the priority automatically. In Outlook, for example, you can manually attach color-coded "categories" to each e-mail and/or set rules such as targeting e-mail originating from a particular sender or with a particular subject line. However, should priorities change, these filters and color codes will need to be modified each time a priority is modified.

Some people create subfolders in their Inbox and setup rules to direct e-mail in the subfolders based on certain senders or subject lines. Unless you are an Outlook wizard, we don't recommend this practice. You have to continuously check individual folders for new e-mails and with hundreds of new e-mails per day, managing many subfolders will become very complex and time consuming. Should you prefer to create sub-folders for better search, you may consider Outlook 2007 (advanced search and indexing capabilities. Some limitations may apply depending upon how Search & Indexing operations are configured on your machine, among other factors).

Messagemind's C-MAIL software, as shown in the screen shot below, automatically prioritizes and organizes e-mail in Outlook (using patent-pending dynamic prioritization technology) based on the user's prior history, clicking behavior, user's feedback and company business rules.

Each e-mail in the Inbox or any of its Sub-Folders, and Sent Items is assigned a numeric value and color coded category on a scale from Very High, High, Medium, Low to Someday. Different views are provided within Outlook to display e-mail organized by priority and workflow flags.

Another important practice to improve productivity is to compartmentalize "Read Mode"; that is Read in Batches and by setting specific time windows to read your e-mail (morning, in-between meetings, etc). Remember, lower priority e-mail can be read later – Messagemind's C-MAIL software moves non-priority e-mail to a lower category, 'Someday' and present it at the bottom of your view.

Figure 4.1a: E-mail arranged by (recipient's) Priority

Note: C-MAIL's Dynamic Prioritization™ software automatically adds a color coded priority to each e-mail and organizes e-mail in MS Outlook™.

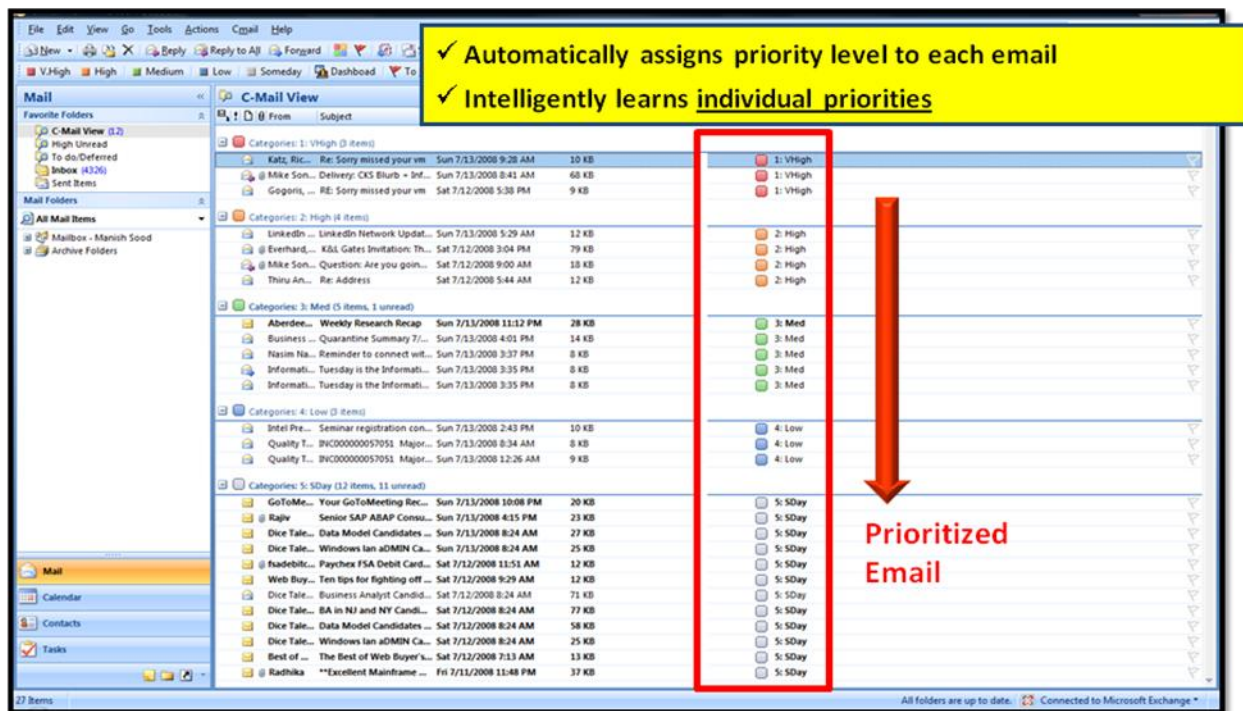


Figure 4.1b: Easy User Feedback

Note: User can easily change the priority and the system algorithms understands this feedback to prioritize e-mail more accurately (within MS Outlook™)

✓ Adjust priority with a simple click
✓ Priority is configurable to business rules

From	Subject	Received	Size	Mileage	Categories
Categories: 1: V:High (3 items)					
Katz, Ric...	Re: Sorry missed your vm	Sun 7/13/2008 9:28 AM	10 KB		1: V:High
@ Mike Son...	Delivery: CKS Blurb - Inf...	Sun 7/13/2008 8:41 AM	68 KB		1: V:High
Gogoris, ...	RE: Sorry missed your vm	Sat 7/12/2008 5:38 PM	9 KB		1: V:High
Categories: 2: High (4 items)					
LinkedIn ...	LinkedIn Network Updat...	Sun 7/13/2008 5:29 AM	12 KB		2: High
Everhard,...	K&L Gates Invitation: Th...	Sat 7/12/2008 3:04 PM	79 KB		2: High
@ Mike Son...	Question: Are you goin...	Sat 7/12/2008 9:00 AM	18 KB		2: High
Thiru An...	Re: Address	Sat 7/12/2008 5:44 AM	12 KB		2: High
Categories: 3: Med (5 items, 1 unread)					
Aberdee...	Weekly Research Recap	Sun 7/13/2008 11:12 PM	28 KB		3: Med
Business ...	Quarantine Summary 7/...	Sun 7/13/2008 4:01 PM	14 KB		3: Med
Nasim Na...	Reminder to connect wit...	Sun 7/13/2008 3:37 PM	8 KB		3: Med
Informati...	Tuesday is the Informati...	Sun 7/13/2008 3:35 PM	8 KB		3: Med
Informati...	Tuesday is the Informati...	Sun 7/13/2008 3:35 PM	8 KB		3: Med
Categories: 4: Low (3 items)					
Intel Pre...	Seminar registration con...	Sun 7/13/2008 2:43 PM	10 KB		4: Low
Quality T...	INC000000057051 Major...	Sun 7/13/2008 8:34 AM	8 KB		4: Low
Quality T...	INC000000057051 Major...	Sun 7/13/2008 12:26 AM	9 KB		4: Low
Categories: 5: SDay (12 items, 11 unread)					
GoToMe...	Your GoToMeeting Rec...	Sun 7/13/2008 10:08 PM	20 KB	05	5: SDay
Rajiv	Senior SAP ABAP Consu...	Sun 7/13/2008 4:15 PM	23 KB	05	5: SDay
Dice Tale...	Data Model Candidates ...	Sun 7/13/2008 8:24 AM	27 KB	06	5: SDay
Dice Tale...	Windows lan aADMIN Ca...	Sun 7/13/2008 8:24 AM	25 KB	06	5: SDay
fsadebit...	Paychex FSA Debit Card...	Sat 7/12/2008 11:51 AM	12 KB	05	5: SDay
Web Buy...	Ten tips for fighting off ...	Sat 7/12/2008 9:29 AM	12 KB	05	5: SDay
Dice Tale...	Business Analyst Candid...	Sat 7/12/2008 8:24 AM	71 KB	06	5: SDay
Dice Tale...	BA in NJ and NY Candi...	Sat 7/12/2008 8:24 AM	77 KB	06	5: SDay
Dice Tale...	Data Model Candidates ...	Sat 7/12/2008 8:24 AM	58 KB	06	5: SDay
Dice Tale...	Windows lan aADMIN Ca...	Sat 7/12/2008 8:24 AM	25 KB	06	5: SDay
Best of ...	The Best of Web Buyer's...	Sat 7/12/2008 7:13 AM	13 KB	05	5: SDay
@ Radhika	**Excellent Mainframe ...	Fri 7/11/2008 11:48 PM	37 KB	05	5: SDay

4.2 Planning Mode: Separate Actionable E-mail

This is the “Planning” part of your e-mail. In this mode your objective is to identify actionable e-mail and plan actions using the 4D’s ((To-) DO, Defer, Delegate or Delete)! The important productivity practice to apply is, after you read an e-mail and before you move to the next e-mail (and this is really important), you need to make a decision: Does this e-mail require an action?

If the e-mail is actionable, you have to decide “WHEN” you will take the action. Remember, you don’t have to decide “What Action”, you have to just select “When”. For example: Will you complete an action by “today” – it is called a “To-Do” action item. If you complete it by “end of the week”, “end of the month” or at a specific future date & time – it is called a “Defer” action item. C-Mail allows you to easily defer an e-mail to a specific date and time.

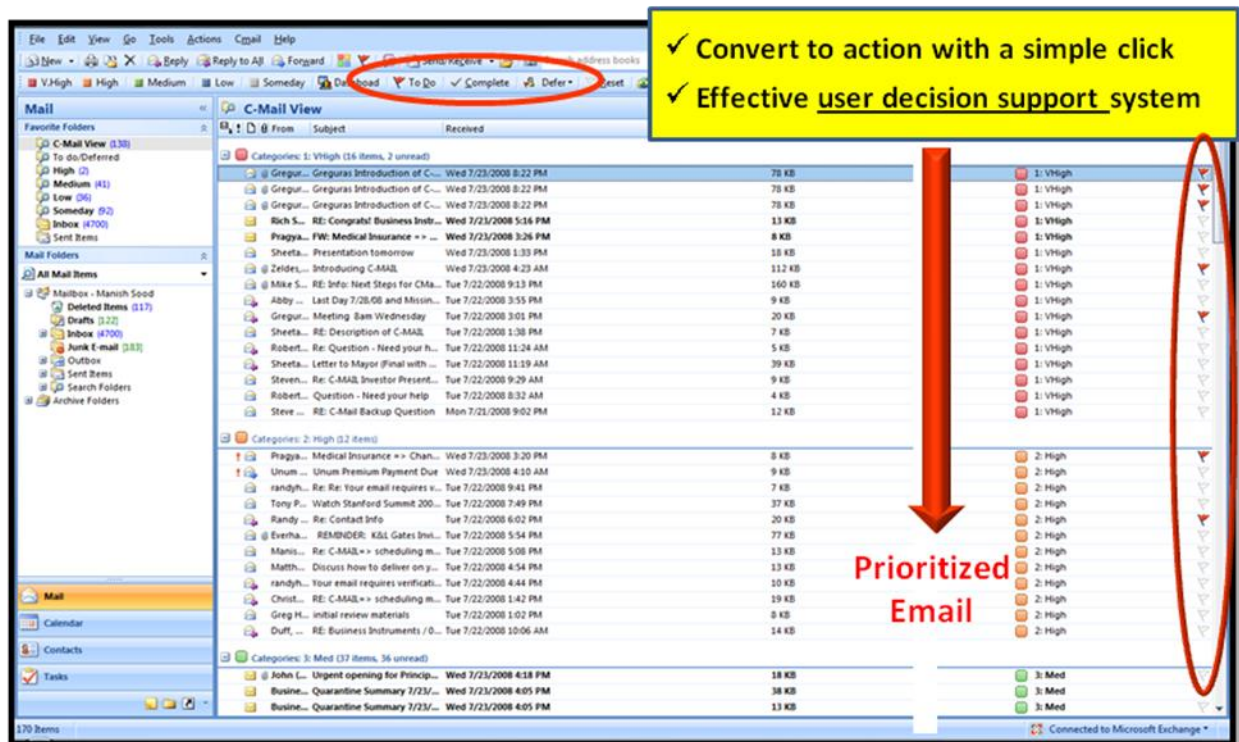
If the e-mail is not actionable, move on to the next e-mail.

We don’t recommend manually filing, or manually archiving e-mail during prime work time. E-mail housekeeping can be a serious time consuming exercise. $3 \text{ Seconds} / \text{e-mail} \times 100 \text{ e-mail} / \text{day} \times 200 \text{ Work days} / \text{Year}$, leads to $2 \text{ Days Lost} / \text{Year}$. The housekeeping functions can and should be automated.

Messagemind’s C-MAIL software helps you identify actionable e-mail and plan actions on them. It can be configured to automatically perform intelligent mailbox housekeeping for you such as filing e-mail in personal folders, removing unimportant e-mail from your mailbox, among many other functions. As shown in the screenshot, C-MAIL automatically separates actionable e-mail and presents it in a separate action folder. A user can assign an e-mail as a “To-Do” item, i.e. complete action on the same day, or the user can “Defer” and take action during an alternate specific date & time. ‘Deferred’ e-mail are removed from your e-mail view (not physically moved from your inbox) only to appear again as a To-Do item at the assigned day & time.

Figure 4.2: Identify & separate actionable e-mail

Note: C-MAIL software provides an intuitive workflow in MS Outlook™, based on productivity best practices.). Users can plan actions (To-Do, Defer or Delegate) with a single-click. Actionable e-mail are shown in a separate view folder.



4.3 Working Mode: Execute Important Actions First

This is the 'Action' part of your e-mail. In this mode we execute actions based on our "To-Do" list without being distracted by new e-mail.

The important productivity practice is to: Prioritize your actions! In the previously cited example, the customer proposal may be worked on first. Allocate specific time intervals for this activity. You should choose the time to perform in this mode when you are most energetic. You need a clear mind and complete focus to be productive in this mode!

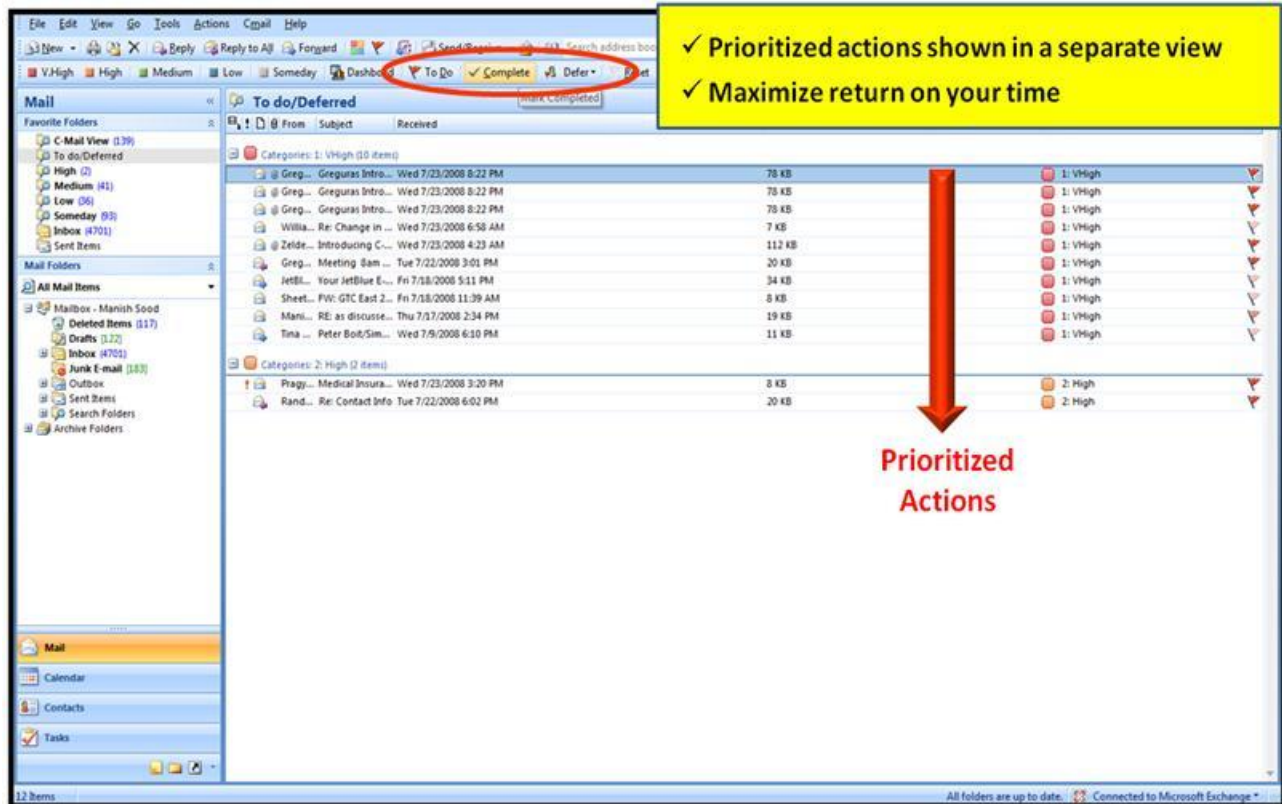
Remove all distractions around you. Remember the high cost of interruption. For a set period of time, close "new e-mail" notifications, close chat boxes, put your phone to do-not-disturb, and perhaps put a "do-not-disturb sign" on your workspace. Avoid smart phones or other small screen devices when in this mode! Take actions, make decisions and move on to the priority action item.

Change the "Flag Status" to "Complete" after you have completed taking the action. If you have finished your To-Do list for today and have some extra time, you can get to your Deferred List. C-MAIL can perform these tasks automatically.

You will feel a real sense of accomplishment after you complete all your To-Do items for the Day and by knowing that you have taken care of all the important action items.

Figure 4.3: Execute Actions, Important Actions First.

Note: C-MAIL provides a prioritized To-Do list. Users can change status to “Complete” with a single click. Completed items are automatically moved out of the action folder.



4.4 Productivity Goals & Policy: Establish Target Levels & Measurement

Organizations must establish clear and quantitative e-mail productivity goals at various levels, i.e. individual, team or unit, and enterprise levels. Organizations should establish a mechanism to gather data in compliance with user privacy and HR policies, measure performance-levels, identify improvement opportunities and tailor training programs based on the specific problems identified from the data analysis.

This set of management practices (at Messagemind we call it Total Quality Management of E-mail communication (TQME)), like any successful quality management effort requires involvement of the workforce and a dedicated focus from senior management. Champions should be indentified for each department who work closely with corporate teams.

Following are some examples of the constituents of e-mail productivity policy that an enterprise or government agency should clearly define for their workforce, and should train and implement using technologies and best practices such as Messagemind:

E-mail Use: Templates for sending important e-mail, clearly defined subject lines, group e-mail use including forwarding and cc guidelines, personal & business use of e-mail, priority policy when working on e-mail, time gap between e-mail received and e-mail read for important e-mail, time gap between e-mail received and replied for important e-mail, time gap between e-mail received and the action completed, among others.

E-mail Branding: Auto signature, legal disclaimer, color and size of fonts, and formal or informal style of salutation and writing when communicating with customers, vendors and partners.

E-mail Legal Policy: The type of issues that should or should not be included in e-mail, use of encryption, sensitivity levels, expiration, deletion and archiving

Following are some examples of the metrics and reports that C- MAIL automatically gathers for individual, group or enterprise productivity.

Productivity Index Reports measure productivity trends on a scale of 1 to 100 (100 being the highest productivity level). The productivity score will be higher if the workforce is addressing important e-mail first and aligned with company priorities and best practices. This is an important gauge to look at to measure improvements after implementing e-mail productivity technology and training initiatives.

Top Senders reports indicate who the top senders are and whether their e-mails are timely read. For example, for the sales department – the top senders should be their A- list customers!



transforming business by transforming e-mail

Top Threads reports indicate what type of issues the workforce is spending their time on. For example, whether the increased e-mail communication with customers is due to new product launch orders or whether it is due to increased customer complaints.

Workforce Behavior Reports measures the volume trends of important e-mail read and responded to by the workforce. It also measures whether the amount of unimportant e-mail being read or responded to by the workforce is decreasing or increasing and who is generating that unimportant e-mail.

Top Recipients Reports show how individuals and teams are communicating around specific projects or areas of expertise. Are they reading their important e-mail within the set time duration? Are there any communication breakdowns?

The performance metrics reports show key volume metrics such as amount of e-mail received, read and replied to, and time taken to read and respond to each priority category of e-mail.

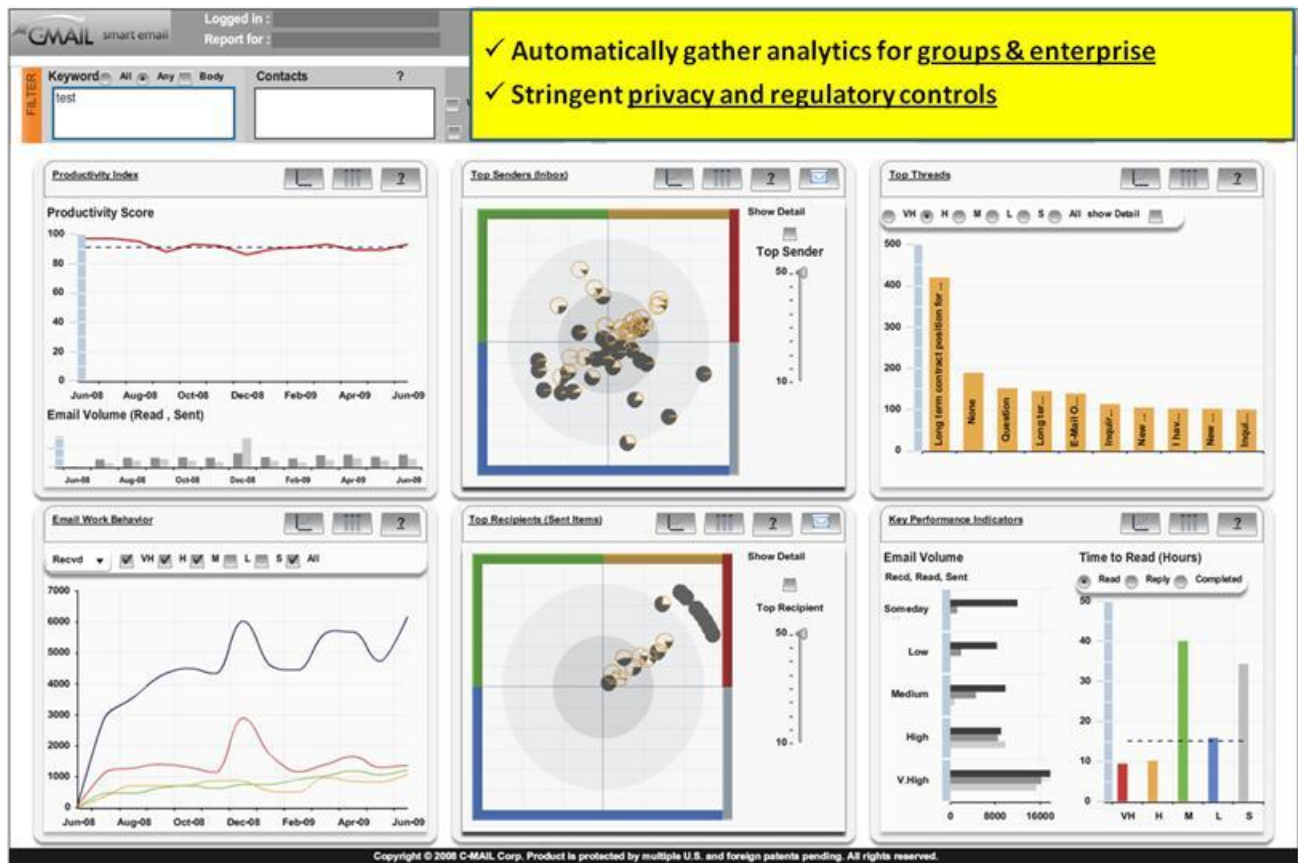
MessageMind's DASHBOARD has a variety of additional reports that company management can use to gather key performance indicators, identify communication bottlenecks, specific problems that need to be addressed via training and development, and in turn significantly increase e-mail productivity of their workforce.

The data and analysis is equally beneficial to the users, provided it addresses the user privacy concerns. MessageMind works in the background and automatically gathers data and provides analysis – all in compliance with the toughest country-specific privacy laws and HR policies of global enterprises.

Based on our experience, clearly quantifying productivity goals and showing data, helps individuals gain more insights about their own behavior and motivates them to successfully adopt new productivity technologies and best practices. This cannot be possible without a company clearly communicating how MessageMind meets user privacy needs, and helping the workforce drive to excel and be the best in their industry.

Figure 4: E-mail Productivity Policy: Metrics, Measurement & Reporting

Note: C-MAIL's patent pending system automatically analyzes e-mail data and provides measurements and reporting on individual and group productivity. C-MAIL provides a proprietary productivity score on a scale of 1 to 100 (highest). Customizable reports are available to track key service level performance metrics, map work relationship among project team members, and identify any bottlenecks in the communication flow.



5. Conclusion

The relentless exponential growth in e-mail volume is negatively affecting enterprise performance and profitability in multiple ways. Higher costs are incurred from lost productivity, archiving, and mobile bandwidth to name a few. Delayed 'time-to-action' thwarts decision making, extends time-to-market and impairs customer retention and new revenue creation. Furthermore, 'institutional memory' and valuable information about opportunities and relationships is untapped or lost, buried in inboxes scattered across the company.

E-mail Overload significantly impacts organizations' top and bottom lines. It results in delays in "time to action", "time to decision" on important priorities, as well as results in the workforce losing their valuable time on unimportant issues. To put it in perspective, a 60,000 employee firm reported \$150 Million or more in direct losses per year due to e-mail overload, and that the problem is compounding further. Indirect losses, such as "time to action", "time to decision", "time to market", "impaired customer relations" are estimated to be a multiple of these direct losses.

The e-mail overload problem is caused by several factors including: Poorly defined or lack of productivity goals, lack of a measurement and reporting mechanism, lack of e-mail prioritization according to individual and business priorities, and a lack of a decision support system to help individuals prioritize actions.

Enterprises need a way to allow the individual to assess their own performance and/or performance in the context of the team, business unit or entire enterprise. Goals and policies can be set at the individual, group or enterprise level.

Messagemind's technology is 'game-changing' in that it transforms e-mail overload from a costly problem to competitive advantage.

Companies, government agencies and non-governmental organizations can diminish e-mail overload, and improve the productivity of their workforce, in some cases by more than 25% by using e-mail productivity management, analytics and reporting technologies such as Messagemind.

Companies that use the ever increasing e-mail overload challenge as an opportunity to lower costs improve decision cycles, and increase revenues will have a better chance of survival and growth in this era of information overload.

6. About Authors

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7. About Messagemind™

Messagemind (www.messagemind.com) provides a suite of easy-to-use intelligent software and services that are helping global enterprises and government customers leverage e-mail overload to increase productivity, accelerate innovation and enhance customer service.

Messagemind is the only company that offers complete e-mail productivity and business intelligence software including Dynamic Prioritization™, dynamic social network analysis, productivity analytics and reporting at all levels. Privacy and security controls are provided to meet stringent requirements of EU and other country-specific laws and company policies.

Should you wish to contact us to discuss this whitepaper or other related research topics, please contact us at corporate@messagemind.com or by phone at +1 212.234.4300.

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