

2nd Annual Solo and Small Firm Conference and Expo

Mastering your Mailbox: E-mail and Information Management

by

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Are you at the mercy of your inbox? Do you feel like you can't get to the important work because you spend all your time weeding through spam or trying to organize your file-related e-mail? This session will teach you how to better manage your time, harness your inbox and make e-mail the workhorse driving your practice forward that it was intended to be. Use Outlook™ and other programs to help you find what you need — when you need it — keep your e-mail organized and filter out spam!

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Mastering your Mailbox: E-mail and Information Management

1. Introduction

2. Tips and techniques

There are several ways to attack your email morass. The first can be called 'divide and conquer'. This technique involves separating your email addresses:

#1 Use more than one email address:

Create separate email address for:

- Business use (may even consider 2...one for general use and one that is more closely guarded)
- Personal use (to avoid all those personal messages going thru your office server and system...)
- HTML – for travel) (such as gmail or hotmail) that can be reached from any computer connected to the internet for ease of retrieval.
- and...Disposable. For example, many web sites require a working email address in order to enter the site via a password.

<http://www.10minutemail.com/10MinuteMail/index.html> will give you an email address that expires after 10 mins. This is particularly useful when you need a quick email address and you don't wish to generate spam on your personal or business email addresses.

The second technique is being rigorous on when you give out your business address or addresses.

#2 Don't use your business address for anything other than business

Use a separate email address for listservs and other information or public uses...let these emails build up elsewhere...so that when you open your business email (Outlook or GroupWise), you are not inundated in useful (but not necessary) emails.

The third tip is to be equally rigorous in regards to what you store in your inbox.

#3 Use your inbox only to gather mail

Your inbox should not be used as a repository for To-Do's, memos, meeting notes, reminders, attachments, events, addresses, URLs etc...there are other ways to store those for recall purposes.

Put those items in folders (To-Do's, Reminders, etc) or in your Practice Management Software (TimeMatters, Amicus Attorney, PC Law, LawStream etc...). Practice Management software is particularly apt here – the electronic calendar, contact manager and To-Do lists are excellent in this regard.

The 4th tip is designed to start to give you some breathing space...

#4 Clean out your inbox ...now

There is **no** way you will be able to get on top of your email if you are fighting the avalanche from the inside...you have to get out from under them in order to start imposing some order.

Need a fresh start...by filing the emails (not dealing with them right now). Go thru the emails ..quickly..the ones that absolutely need replies...leave...the ones that can be filed away in other folders (reading, listservs, personal etc) do so. The important thing is to triage your email....separating it into urgent and important, urgent but not important (ie not right now) and everything else.

Then – go back and attack the urgent and important emails. Now!

The urgent but not important ones....scan and see if you absolutely need to deal with any of them.. If not ...leave them in their current folder.

Leave the others in the folders that they are on.

Now – your inbox should be cleaned out...the next steps are to use flags and filters to sort your emails as they come in – without requiring you intervention (see filter and flags herein).

RSS

There is a way to reduce the email load ..but using RSS – Really Simple Syndication.

This software allows you to separate current awareness from correspondence, by setting up a feed reader to deliver the content to you – in a web-page format – that is refreshed ...instead of subscribing to listservs that only stuff up your mailbox – with outdated news and information.

How to get started with RSS:

1. Get a reader (or aggregator)
 - a. FeedReader (download)
 - b. Bloglines (web-based)
 - c. MyYahoo (web-based)
2. Subscribe to Feeds
 - a. Feedster
 - b. Syndic8

Look for XML or RSS on web pages that contain information that you wish to review and use to stay current.....you can then subscribe to the information on the page and have the information delivered to you to your aggregator and .

Gmail

There are many web-based email services available..(Yahoo being the other major alternate in my opinion to Gmail) but my personal favourite is Gmail – or Google Mail. This is (arguably) the world's best web-based mail. It offers HUGE capacity – currently 2.8 GB of storage – that increases daily. Gmail allows users to filter messages by their text; their From, To, and Subject fields; and by whether or not the message has an attachment. It offers automatic threading of discussions as well as an automatic notifier (with download). Furthermore, there is automatic spam filtering, Messaging forwarding, signatures and much much more!! Executable files are automatically blocked by the spam filtering system.

Gmail automatically saves contact information when you send an email to an unknown recipient - and it updates the contact information automatically - as well. The system also 'autosaves' draft emails....limiting the loss of content when composing an email.

Gmail integrates GTalk – an instant messaging program – into the Gmail service as well as GoogleDocs, GoogleSpreadsheets, a Photograph sharing service (Picassa), a calendar and more.

It is a great resource for use for a project (you can set up documents on the web for sharing and collaboration), or for personal mail. While Gmail has its detractors (privacy concerns being foremost, as Google could, theoretically, combine a users email history with their search history to profile the user), all in all it is a very useful email service for non-business related emails.

3. Filters, Flags, & Search Folders

Filters

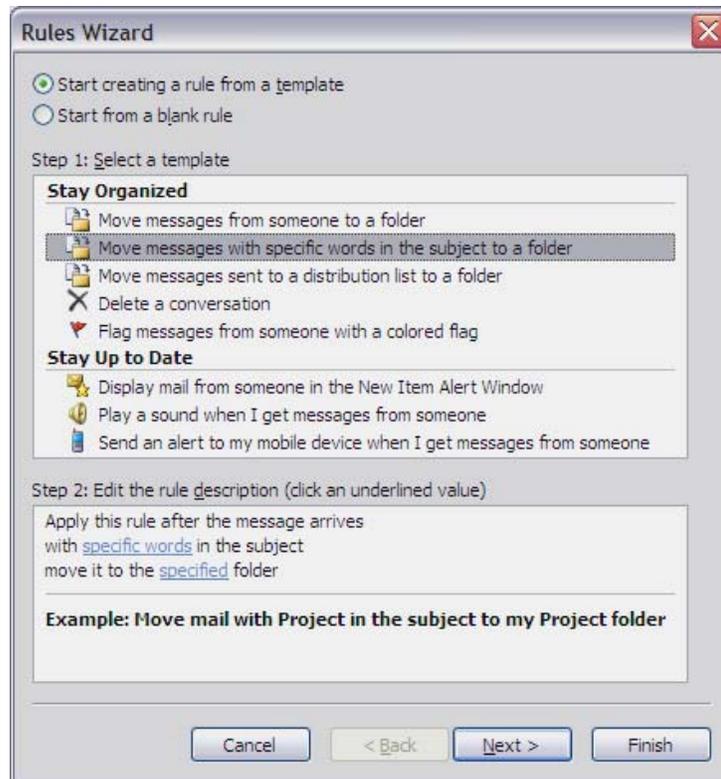
- Once you have filters built, you can have your mail automatically filed into folders as you wish
- Or you can use filters to automatically delete junk mail
- Use the exceptions and variations to suit your situation

A filter, also known as an email rule, consists of three parts:

1. **The conditions that the rule is looking for**, such as: a word in the subject , or a specific email address in the From, or your email address in the CC or To, or your email address not in the To (someone CC'ed or BCC'ed to you). Multiple conditions can be specified together, such as a specific word in the subject and from a specific email address.
2. **The action to take once the condition matches**, such as: move it to a specific folder, or delete it, or forward it to another email address, or mark it as important, or flag it for further action, or mark it as read. Multiple actions can be performed together, such as mark it as read and move it to a folder.
3. **Exceptions to the rule**. You can specify exceptions criteria to exclude any emails that match the conditions, such as: exclude if there is an attachment, or if from someone on my Contacts list. Multiple exceptions criteria can be specified.

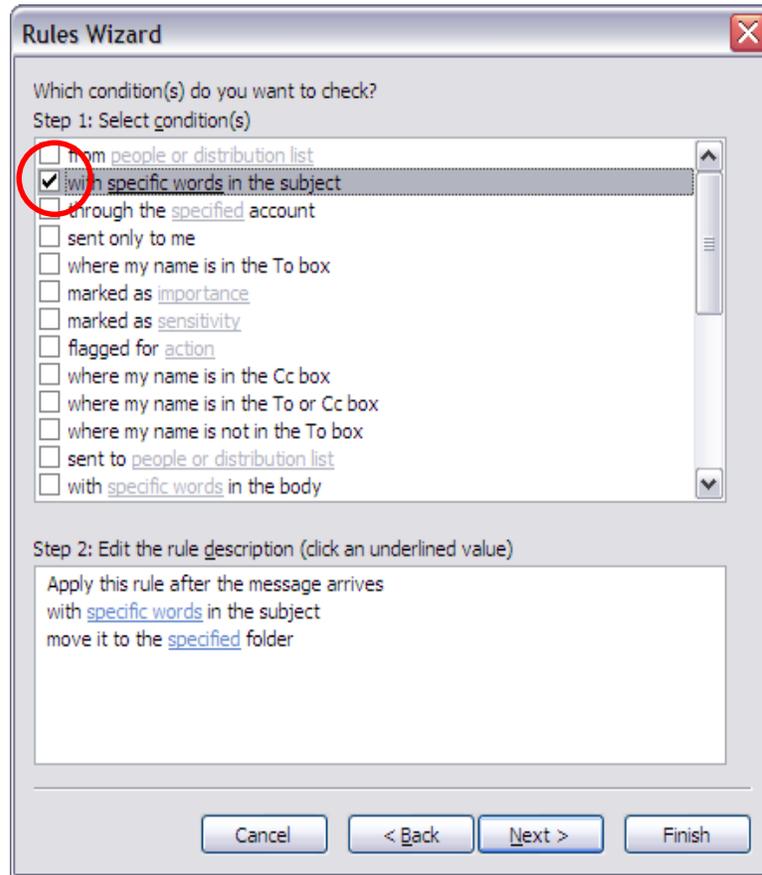
To create a filter:

1. Select "Rules and Alerts..." from the "Tools" menu.
2. Click "New Rule...". The "Rules Wizard" will appear as shown below:

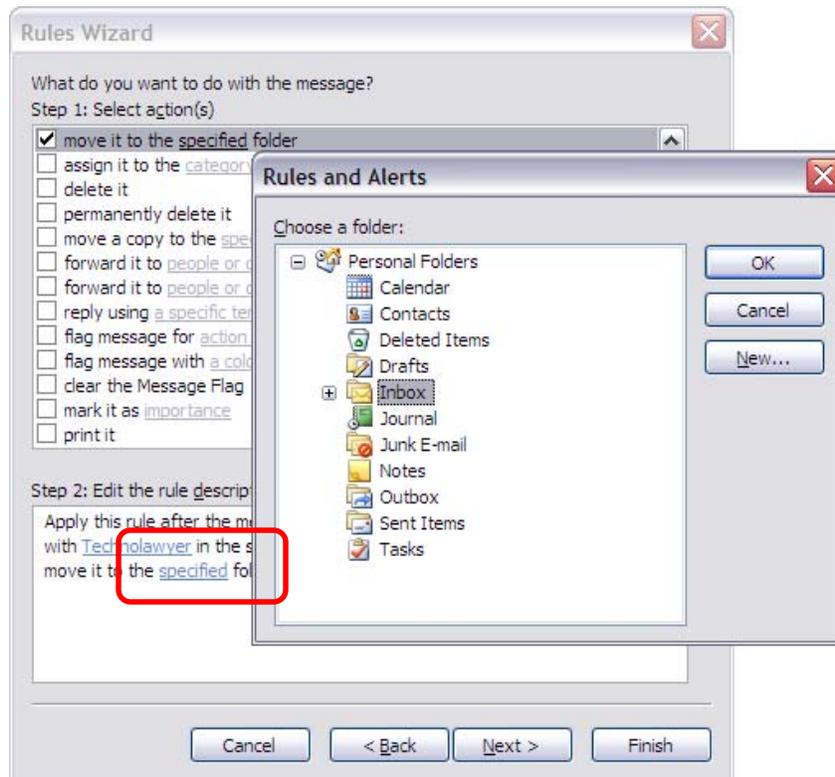


3. Click “Start creating a rule from template” for the most typical rules, or “Start from a blank rule” to create a rule from scratch, and then click “Next” button.

4. Now you specify the conditions. In the “Step 1” part at the top, click the box beside the condition you want to use, such as “with specific words in the subject”.



5. Then in “Step 2” at the bottom, click the underlined words and enter the specifics of the condition, such as words to look for in the subject and the folder to move the email to.



6. If you want the rule to look for several conditions, such as the subject contains specific words and it is from a specific email address, then select those additional conditions now. When done, click “Next”.
7. If you want to specify any exceptions, select them in a similar manner to the way that you selected the conditions. When done, click “Next”.
8. As the last step, give the rule a name and select “Finish” to finish creating the rule. Now whenever an email is received that matches the conditions (excluding any exceptions), the specified action will be taken.

Flags

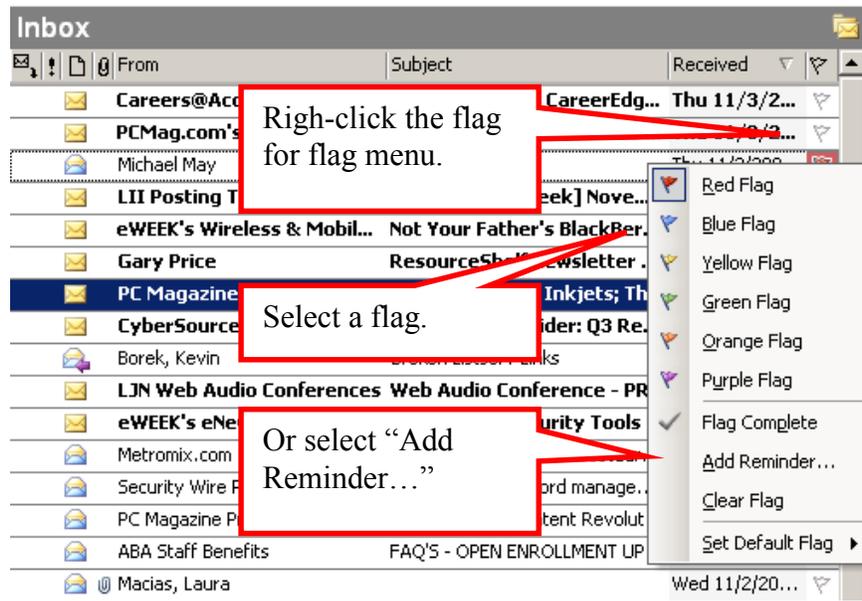
- Use flags to follow-up for incoming and outgoing e-mail
- Numerous action options and colours
- Uses pop-up reminders for you or recipient
- Arrange by colour for at-a-glance priorities

Emails can be flagged in one of two ways:

1. A coloured flag can be added to the email, or
2. A dated reminder can be added to the email.

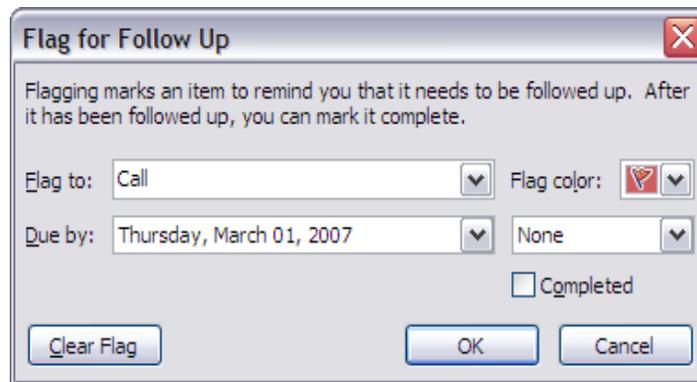
Note: Compared to earlier version of Outlook, Outlook 2007 has coloured categories instead of coloured flags. And it now has date flags (i.e.: Today, Tomorrow, This Week, Next Week, No Date).

To add a flag, start by right-click on the flag symbol that appears to the right of the email (when viewing your Inbox or any email folder). You can also right-click on the email’s subject and select the “Follow Up” sub-menu.



To add a coloured flag, select one of the coloured flags. Emails can then be sorted by flag colour by clicking the flag icon in the column heading.

To add a dated reminder, select “Add Reminder...” from the flags menu. The “Flag for Follow Up” window appears where you can specify follow up details.



Search Folders in Outlook

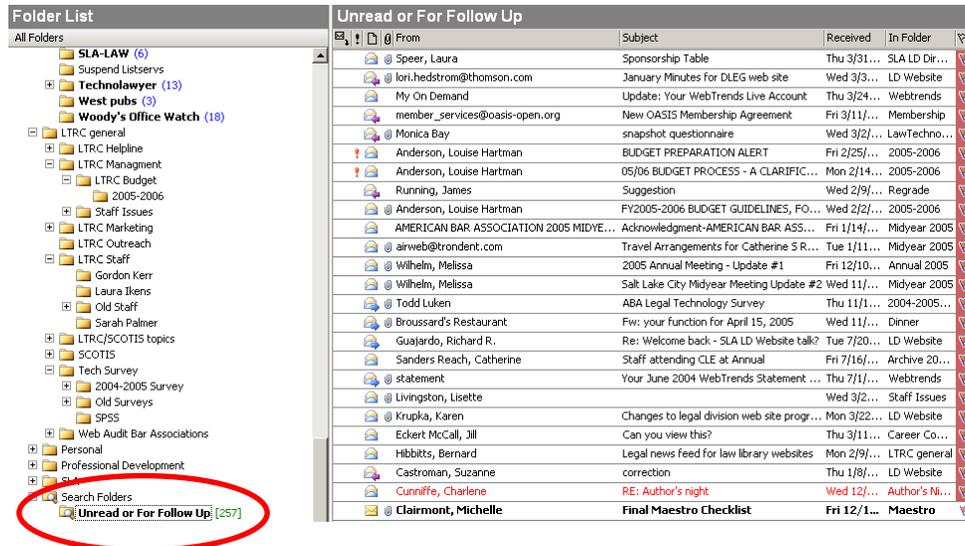
- Search folders show unread messages and those marked for follow-up by default
- Customizable – will show any search you create
- Contains shortcuts to messages - they remain in the original folder

Search Folders help you to quickly find all messages that match a search condition. The two pre-defined searches are for: *Unread Mail*, and *For Follow Up*. And you can define your own Search Folders, such as searching for a specific word in the subject. Multiple

conditions can be used together, such as searching for a specific word in the subject and from a specific email address and unread.

Search Folders appear in the Folder List and look like any other folder. But Search Folders only contain shortcuts to the actual emails. The messages are still in their original folders.

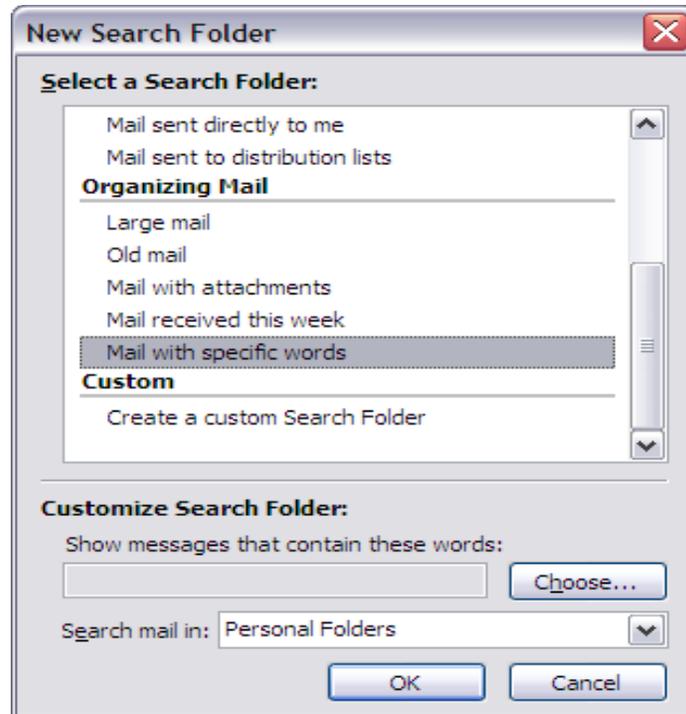
Click “Search Folders” in the Folder List to see the pre-defined searches and any searches that you have defined.



When you click on one of the searches under Search Folders, the results of that search appear on the right-hand side as a list of messages. You can work with those messages as you normally would.

To create a new Search Folder:

1. Select “File menu > New > Search Folder...”, or right-click on “Search Folder” and select “New Search Folder...”.



2. Select the type of the new Search Folder, such as “Mail with specific words”.
3. When you select some types of Search Folder, a “Choose...” button appears so that you can specify the details of the search. If present, click “Choose...” and enter the search criteria, such as specific words to search for.
4. Click “OK” to save the new Search Folder.
5. The new search will appear in the Folder List and results of that search will appear on the right-hand side.

Note: When you first create a new Search Folder, a search is performed on all of your messages. Depending upon how many messages you have, it may take a few minutes for the search to finish. In the future when you click on an existing Search Folder, the results will appear immediately.

4. Spam

Email systems can be configured in most cases, to weed out spam automatically. There are also other ways to prevent spam from coming into your inbox.

1. ***The first is to avoid giving out a valid email address.***

There are services such as 10 min mail – that will provide you with an email address that self-destructs in 10 minutes time – just long enough to receive a password to enter a site that harvests an email address as the cost of entry (www.10minutemail.com/10MinuteMail/index.html). This avoids having to give out an address that will only collect spam.

2. Do not respond to emails that state “To be removed from this list go to...”.

Typically these links are simply a way to confirm that your email address is indeed, a valid and working email address – and following this link simply ensures that you have elevated your status from “unknown” to “confirmed”.

3. Don’t spam the spammer.

Some people advocate ‘spamming the spammer’ by replying multiple times to increase the inbox of the spammer. It is questionable if this actually works, since in most cases the email address used by the spammer is not valid.

4. Report the spam:

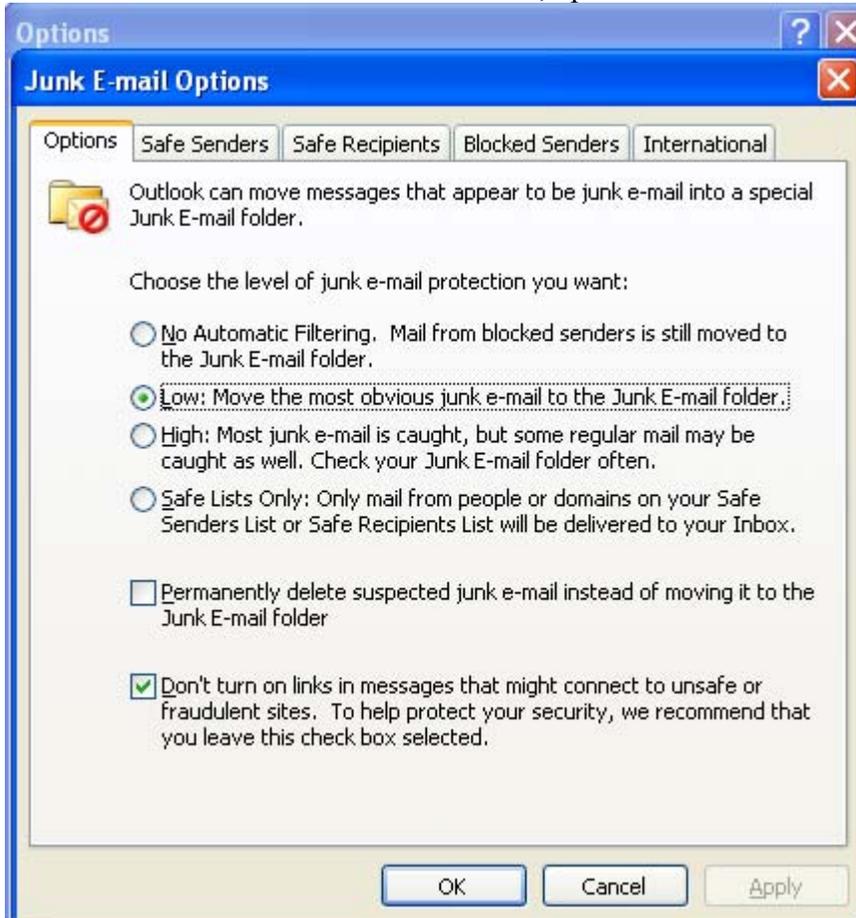
You can report the spam to: spam@uce.gov maintained by the US FTC.

Automated ways to stop spam:

1. Content-based filtering. This technique involves building specific filters to look for key words in your incoming emails, such as “Viagra” and sending the email to the junk pile. The problems with this technique is that you have to create the filters, the spellings used by the spammers vary (for example, via*gra) and it may in fact filter out legitimate emails.
2. Statistical Filtering. In this case, you acquire a software program that implements statistical filtering to exclude spam. The advantages here is that this technique requires no user intervention. Email programs that incorporate statistical filtering include Bogofilter, the e-mail programs Mozilla and Mozilla Thunderbird, Mailwasher, and later revisions of SpamAssassin.
3. Heuristic Filtering. This technique is incorporated in the software SpamAssassin and Policyd-weight. This technique uses multiple tests for spam and assigns a numerical score to each test. Every incoming message is scanned for these patterns. If the applicable scores in total are above a fixed value, the message is rejected or flagged as spam.

4. Outlook spam techniques (Outlook 2003): Since most of us use MS Outlook (at least for our business emails) we should cover how to configure Outlook to minimize spam.

First, in Outlook click on the “Tools” menu, then “Options”, and then click “Junk E-mail” on the Preferences tab. This in turn, opens the Junk E-mail Options dialog box.



You can choose the level of spam protection that you feel appropriate. You can start on “Low” and if this still produces too much spam, switch to High or even Safe Lists Only.

Now – use the safe senders list to add in email addresses that are generating ‘false positives’ and being tagged as spam needlessly.

Lastly there is the “Block senders list” which allows you to add in addresses to which you do not wish to receive any further emails. For example, at the Law Society they have added email addresses of those individuals who have repeatedly spammed everyone in the organization to save everyone the tedious task of having to delete these unwanted emails.

5. Phishing emails

Phishing emails are emails that appear to be from legitimate organizations such as a bank but are in fact forged emails that attempt to fool the user in order to fraudulently acquire information from the user such as their bank account number and/or password for illegal uses including identity theft. A phishing email usually shows a bank's logo and claims that there has been a security breach or new feature and the user is prompted to click on the link in the email and log in. However, the link in the email does not go to the organization's website but instead is redirected to a fraudulent website that mimics the organization's website.

How to Prevent Phishing

- Upgrade to Outlook 2003 or an even newer version
- Install the latest Office 2003 Service Pack
- Install the Junk e-mail filter update for Outlook 2003

As part of the Outlook 2003 Service Pack 2, the Junk E-mail Filter now checks for Phishing e-mails. The phishing protection feature is not available for earlier versions of Outlook.

To install the latest service packs and updates for Microsoft Office, go to <http://office.microsoft.com> and click on "Check for free updates".

Internet Explorer 7 comes with built-in Phishing Filter. Upgrade to Internet Explorer 7. That way, if any phishing emails get past Outlook, those phishing websites will hopefully be blocked by Internet Explorer 7.

Junk E-mail Filter – Phishing Protection

- Dangerous email is automatically routed to your "Junk E-mail" folder.
- All formatting has been stripped out – all html, all pictures – all you see is straight text.
- All hypertext links are turned off.
- If good emails are ending up in your "Junk E-mail" folder, then: Right-click on one of those emails. Then click "Junk E-Mail" and then "Add Sender to Safe Senders List".

Warning: Do not add your bank's email address or domain name to your Safe Senders List because phishing e-mails typically have forged *From* addresses. The Junk E-mail Filter does not scan any email from your Safe Senders List.

6. Security

The best treatment of this area for Canadian lawyers is the PracticePro publication:

Managing the security and privacy of electronic data in a law office Booklet available at: (<http://www.practicepro.ca/practice/ElectronicDataSecurity.asp>). This is attached in Appendix One.

Anti-virus & Firewalls

These are ‘must haves’ today – as any machine that does not have a good anti-virus program will be attacked shortly after being connected to the internet. And a firewall prevents intruders from coming into your system.

There are certified Anti-virus software lists maintained by ICSA labs, who tests Anti-Virus software. Their results can be found at: <http://tinyurl.com/aoyns>.

Furthermore, Certified Firewalls can be found at: <http://tinyurl.com/agmr6>.

Regarding anti-Spyware, PCPro (the IT magazine) also tests anti-spyware products.

Their results are at: <http://tinyurl.com/dmz5n> - for the year 2005
And <http://tinyurl.com/ock5e> - for the year 2006 (you can see which ones were top-listed two years in a row).

To save you the search, however, the winner in both 2005 & 2006 was:

PC Tools Spyware Doctor

You can check your own anti-spyware vendor and see how they ranked.

7. Learning more

- **More useful information and links:**
 - www.cusimano.com/lawyer/expo2007
- Rogue/Suspect Anti-Spyware Products & Web Sites:
 - <http://tinyurl.com/ysl0l>
- Subscribe to Bruce Schneier’s newsletter on internet security:
 - <http://www.schneier.com/crypto-gram.html>

- Test your firewalls, wireless security and more...
 - <http://www.grc.com>

8. Conclusion

We have just run through the tried and tested techniques to wrestle the email demon to the ground and start to regain control over your inbox (and your life!).

Now – what remains...is for you to take that first step ...and start along the journey that leads to an inbox that only has a few items (that came in today!) and which you can easily deal with by the end of day. As they say, every journey begins with a single step.

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9. Appendix One

Practice Pro: Managing the security and privacy of electronic data in a law office
Booklet available at: (<http://www.practicepro.ca/practice/ElectronicDataSecurity.asp>).

10. Bios:

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Background:

Peter Cusimano received his B.Sc. in 1989 from the University of Toronto, his LL.B. in 1992 from the University of Windsor, and was called to the bar of Ontario in 1994.

Area of Practice:

Peter Cusimano's area of practice is primarily corporate commercial law with clients in several fields including software and other technology related industries.

Experience:

Peter Cusimano has been using computers since the late 1970's and has been using email in his law practice since the mid-1990's. His work with computers has been profiled in various publications over the years including the Toronto Star, Globe and Mail, The Lawyers Weekly, and others.

Other:

In his spare time, Peter Cusimano is actively involved in the community including participation in the Rotary Club of Markham Sunrise where he manages the Club's website and email newsletter. He will serve as the Club's President in 2007-2008.

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David J. Bilinsky is the Practice Management Advisor and staff lawyer for the Law Society of British Columbia. He is a Fellow of the College of Law Practice Management and the Editor-in-Chief of Law Practice Magazine. He combines his law, math/computer science degrees and subsequent MBA in focusing on law practice management issues emphasizing strategic planning, finance, productivity and career satisfaction for lawyers.

Dave is a prolific writer on practice management and has written for many publications including Law Practice Magazine, Law Office Computing, ABA's GP-Solo Magazine, The Journal of Legal Marketing, the Canadian Bar Association's The National Magazine and others. He is a regular columnist for the CBA's BarTalk (PracticeTalk), the TLABC's The Verdict (Technology), the LSBC's Benchers Bulletin (Practice Tips) and The Lawyers Weekly - Canada (Legal Business). Laura Calloway and Dave Bilinsky are the authors of the Profitability column in Law Practice Magazine. He is Chair of the Editorial Board for Law Practice Magazine, published by the ABA.

Dave is the author of Amicus Attorney in One Hour for Lawyers (ABA) and he has contributed to several books including Barristers & Solicitors in Practice (Butterworths), Flying Solo, a Survival Guide for the Solo Lawyer, 3rd & 4th editions (ABA), Law Office Procedures Manual for Solos and Small Firms, 2nd & 3rd editions (ABA), Managing Your Law Firm (CLE-BC) and the Annual Review of Law and Practice (1998-2003) (CLE-BC). He is a contributing author and past member of the Editorial Advisory Board for Law Technology News, published by American Lawyer Media Inc. He is currently writing "The Associates Guide to Technology" to be published by the American Bar Association.

Dave is the founder and current Chair of the Pacific Legal Technology Conference, a past Co-Chair of ABA TECHSHOW, he has been active in an advisory role for the Technology For Lawyers Conference and for other legal technology programs. He has held many positions in the Law Practice Management Section of the ABA, including the Finance Core Group Chair. Dave is an international lecturer in legal technology, having presented in China, across the US and Canada (including Hawaii and the Yukon) and over the Internet for such organizations as the All-China Lawyers' Association, the American Bar

Association (ABA), LEGALTECH (Toronto, NYC and LA), the Canadian Bar Association (Nationally, BC, Alberta, Winnipeg and Ontario), The Law Society of Upper Canada, the Colorado Bar Association, Canadian Corporate Counsel Association, the Continuing Legal Educational Society of British Columbia, District of Columbia Bar, the Milwaukee Bar Association, NABRICO (Vancouver, Montreal), the Ontario Bar Association, SKLESI, the Trial Lawyers Association of British Columbia, the Washington State Bar Association, and others. His articles have been translated into several languages including French, Mandarin, Spanish and Portuguese.