

# **Outlook Email Tools: Save Time and Money while Reducing Risk**

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**Sperry Software, Inc.**

**White Paper**

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## Introduction

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Communication via email has become a necessary part of the workplace, with many organizations using Microsoft Outlook as their primary email application. While initially seen as a timesaving measure, sending and receiving email messages now takes up a significant portion of each employee's workday, even for those who take advantage of Outlook's most efficient features. Simply maintaining an email system has also become more challenging, as IT attempts to battle bulging servers and growing problems with security.

In an attempt to address these issues, some companies have implemented complex server-side solutions. Although these can be effective, they come with a rather high price tag. Other companies have tried conducting employee training sessions in email etiquette. While useful, the effectiveness of these sessions depends entirely on each individual's response.

What many may not realize is that a third option exists. Email management tools are available for Outlook that are effective, easy to implement, and relatively low in cost.

## Industry Trends

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According to Osterman Research, email has become not only an indispensable vehicle for communication, but it has also surpassed other means of communication in its popularity:

Electronic messaging has become the de facto communications medium and file transport system used in the workplace today. Most information workers rely on email more than they do the telephone, fax or paper-based communication....Consequently, messaging—particularly email—has become absolutely critical to the operation of most enterprises.

The maintenance costs for this important communication system can comprise a respectable portion of any IT department's budget. According to Osterman Research, "Maintaining messaging functionality is not a trivial expense....The total cost of ownership for a messaging system is anywhere from \$15 to \$50 per seat per month and can be much more in some cases." The report also lists a number of factors contributing to the rising cost of email.

In addition to rising costs, the volume of business email has been growing at an ever-expanding rate. In April of 2007, IDC published a press release with this prediction:

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IDC estimates that the size of business email volumes sent annually worldwide in 2007 will approach 5 exabytes, nearly doubling the amount over the past two years (Note: 1 exabyte = 1 thousand petabytes = 1 million terabytes = 1 billion gigabytes).

As the volume of email rises, organizations will need to manage it in more effective ways. IT is tasked with making these management decisions, and they are required to meet both technology and business goals. As an article in *CIO* explains, "Every technical decision in regard to e-mail has business consequences. This means that you must get the technology right."

## The Challenges of Poor Email Management

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Three serious problems plague almost all organizations that use email, including those that use Microsoft Outlook as their email application:

1. Inefficiency
2. Security risks and breaches of confidentiality
3. Need for costly server space

### *Inefficiency*

There are many ways in which email is used inefficiently. Sometimes the problem is the result of human error, and other times Outlook itself simply doesn't include the optimum features. In either case, inefficiency is the result of one of three things:

1. Repetitive email tasks
2. Unnecessary email tasks
3. Non-automated email tasks

These tasks simply waste time and need to be eliminated or reduced.

### *Lack of Security and Confidentiality*

Maintaining security and confidentiality with respect to email continues to become more challenging. Many people may first think of spam, viruses, spyware, and the rest of their invasive cousins. Yet it is equally vital to be wary of sensitive information leaving the organization via email. Brian Reed of *SC Magazine* explains this added security concern, noting, "The more recent shift in security risk management focuses on not just keeping on top of vulnerabilities, patches and inbound risks, but also being sure to 'keep the good things in.'"

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Liability is one obvious concern—a very good reason to keep certain information “in.” It is especially easy for damaging information to be leaked via email. For example, leaks happen when the wrong person accidentally gets cc’d on a message. Mistakes like this can sometimes cost millions of dollars. As an article in *Infostor* explains, there have been “a large number of lawsuits in which old e-mails become the key piece of evidence used to confirm charges of corporate wrongdoing.”

When email messages go astray, organizations can also risk losing their competitive edge. Trade secrets, new development ideas, and unannounced product releases are just a few examples of information worth protecting. Yet all of these topics are discussed via email, and messages can easily slip outside company domains.

Just as external security problems pose risks, there are parallel problems with maintaining confidentiality within an organization. Problems like this often arise when employees accidentally send email to groups of people, rather than the specific person to whom the message was intended. This commonly happens when employees unintentionally click “Reply to All” in response to a group message. Suddenly everyone knows about Bob’s demotion, or the fact that Mary despises her newly promoted manager, or that large layoffs are in the works. Problems with confidentiality can affect employee morale and sometimes even the bottom line.

### *Costly Server Space*

Another problem organizations face is the ever-expanding volume of business email and its associated costs. The more email employees receive, store, and send, the more server space is required, and that’s just one cost factor. Because this space is expensive, companies justifiably limit the size of employees’ email accounts.

Yet sometimes the challenge is not so much the email messages themselves, but the space taken up by the attachments. Because email is such an easy way to transmit information, employees often think nothing of including attachments that are quite large. An article in *CIO* states:

Many enterprise users unblinkingly attach huge files to e-mail messages, such as a 40MB PowerPoint presentation or a dozen photos. This slows down e-mail delivery at both client and server (particularly when the message is mailed to a company\_all distribution)....

When employees forward these attachment-laden messages back and forth, the problem gets even worse.

## The Solution: Implementing Email Management Tools for Outlook

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To overcome these problems, businesses are turning to cost-effective email management tools that integrate directly with Outlook. Many have chosen to implement client-side email management tools that are less expensive than their server-based cousins, and yet still provide effective results.

### *Targeting Your Needs*

Client-side email management tools are generally available individually, each one designed to address a particular problem. For example, there are many tools that can reduce the amount of time employees spend on email, thereby improving efficiency. Other tools are specifically designed to improve security or confidentiality. Further options exist that reduce the volume of email being sent as well as the number of attachments sent, saving money on server space. Many additional tools are available to address a bevy of other email challenges.

The fact that these tools are available individually gives businesses the ability to spend wisely by targeting their specific needs. The tools are usually customizable as well, so companies can change their functionality as business needs change.

Often, a single tool addresses one primary problem, but in doing so, solves several secondary problems. This aspect helps make them even more cost-effective.

Because “client-side email management tools” can be an unwieldy term, other terms have evolved to refer to this technology. “Email add-ins” is one popular term, as it reflects the way the tools supplement an existing mail program. Email add-ins used specifically for Outlook are called “Outlook add-ins.”

### *Time Is Money*

If employees saved 20 minutes a day by using Outlook add-ins, their time—converted to compensation—would add up quickly. Take the following example:

#### **Company A**

Number of employees:	1,000
Average annual salary, not including benefits:	\$45,000
Annual labor costs:	\$45 million
Percentage of work day no longer spent on email:	4.2%
\$45 million x 4.2%:	\$1.89 million

For a company of 1,000, the total amount saved in this example would be \$1.89 million. Note that this figure represents salary only rather than full compensation. Of course, employees would receive that money regardless of

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whether or not the email system is made more efficient. But if they weren't spending the time on email, they could be doing productive work to increase company revenues and profits. Is it better to throw away \$1.89 million or invest it in productive work?

### *Outlook Add-Ins: What to Look for in a Provider*

Since Outlook add-ins first became available in 2001, providers have realized just how desirable these tools are. Unfortunately, some have tried to take advantage of the business opportunity by patching together quick Web sites and selling shareware versions of add-in software.

When looking for a provider, it's important to find a professional organization that offers quality products and full support. As you evaluate firms, be sure to consider the following requirements:

#### **Offers an excellent selection**

Choose a provider that not only offers everything you want now, but has the highest chance of satisfying your needs in the future. One-stop shopping is both easier and more efficient. To ensure a good selection, it's best to choose a provider that offers at least 30 Outlook add-ins.

#### **Gives you the ability to customize the add-ins**

Not all vendors offer Outlook add-ins with this functionality. Look for add-ins you can customize, so they'll remain powerful tools that respond to your changing business needs.

#### **Personally assists with the installation**

Find a company that will have their representative work with your system administrator to install the system correctly.

#### **Provides free support through a number of mediums**

There are basically three levels of support you'll see offered by various providers. The first is no support at all. The second is a degree of support—sometimes free, sometimes not—via email or phone. And the third is free and complete support via a full range of mediums. It goes without saying that the more free support you can get, the better.

#### **Offers free access to a toll-free number**

While this may seem redundant, some companies charge for access to their only toll-free number, as part of a premium support package. When you want a toll-free number, you want it to be free. Period.

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### **Provides easily accessible troubleshooting tips**

Sometimes a simple problem arises, and it may be fastest to solve the problem yourself. Find out if the provider has troubleshooting tips available in an easily accessible place.

### **Qualifies as a Microsoft Certified Partner**

To guarantee that the software you purchase will integrate seamlessly with Microsoft Outlook, find a provider who is designated as a Microsoft Certified Partner. These companies must work with individuals trained in Microsoft technology, and their software is required to undergo testing by Microsoft or its authorized vendor.

### **Owns the software they sell**

For consistent products, ease of implementation, and long-term service, choose a vendor that owns their software rather than a reseller. Resellers work with multiple retailers, often selling shareware. Once a purchase has been made, the individual retailers take over, passing the license codes onto the buyer. When you work with a company that owns its own software, purchasing, implementation, and support are all streamlined.

### **Is based in the United States**

If you ever get into a disagreement with any provider, it's easier if the provider is based in the United States, and therefore subject to US law. Disagreements aren't likely to happen, but when they do, it's good to be protected by fair and familiar code.

### **Offers a money-back guarantee**

Look for a provider that will stand behind their products. Although money-back guarantees are not common in the software industry, they can be found for Outlook add-ins. This is an excellent way to reduce your financial risk.

## **The Sperry Software Advantage**

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Founded in 1998, Sperry Software is a leading provider of Outlook add-ins. Based in Jacksonville, Florida, it serves clients nationwide and in Europe. The company offers 36 customizable email tools that enhance and expand the capabilities of Outlook. All add-ins integrate directly with Outlook 2007, Outlook 2003, Outlook 2002, and Outlook 2000.

### *Important Benefits*

Sperry Software's products work with Outlook to improve efficiency, provide greater security and confidentiality, and reduce the amount of server space needed. They provide a number of additional benefits as well.

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The chart below displays a small selection of Sperry Software's Outlook add-ins, illustrating their features and benefits.

Outlook Add-Ins and Primary Features	Efficiency	Security	Confidentiality	Server Space
<p><b>Add Email Address</b></p> <ul style="list-style-type: none"> <li>Automatically adds email addresses to any contacts folder.</li> <li>Adds the people you reply to and/or the people you send direct email to, even cc'd contacts.</li> <li>Processes unlimited email messages via the toolbar button.</li> <li>Scans all previous email to quickly build a library of contacts.</li> </ul>	√			
<p><b>Attachment Forget-Me-Not</b></p> <ul style="list-style-type: none"> <li>Scans all outgoing email messages for phrases like "see attached" or "draft version." If you didn't attach a file, it asks you if you would like to insert one before sending the email.</li> <li>Supports a variety of different keywords.</li> <li>Can be easily enabled and disabled.</li> </ul>	√			
<p><b>Attachment Save</b></p> <ul style="list-style-type: none"> <li>Removes the file attachments from your email as your messages arrive, saving the attachments to a Windows folder.</li> <li>Can be customized by sender, subject, or attachment filename, or all attachments can be removed and saved.</li> <li>Replaces attachments with URL links to the saved files for easy access.</li> <li>Reduces the file size when the user replies to the email or forwards it to others, since the attachment has been removed.</li> <li>Scans all previous email messages for attachments. For example, it can scan the sent items folder and then the Outlook pst files can be compacted.</li> </ul>				√

## Outlook Email Tools: Save Time and Money while Reducing Risk

<b>Outlook Add-Ins and Primary Features, cont.</b>	<b>Efficiency</b>	<b>Security</b>	<b>Confidentiality</b>	<b>Server Space</b>
<b>Contacts Sort Order</b> <ul style="list-style-type: none"> <li>• Allows you to specify the sort order of <i>all</i> your existing contacts, not just new entries.</li> <li>• Updates both the contacts themselves and the address book.</li> </ul>	√			
<b>Distribution List Manager</b> <ul style="list-style-type: none"> <li>• Creates a distribution list from an email with one click of a button.</li> <li>• Instantly creates distribution lists from multiple emails.</li> <li>• Includes simple tools to manage list size, membership, and the accuracy of all email addresses.</li> </ul>	√			
<b>Duplicate Email Eliminator</b> <ul style="list-style-type: none"> <li>• Eliminates duplicate messages that occur within a single folder—a very common problem with synchronization.</li> <li>• Compares messages based on customizable fields, including subject, body, from address, to address, number of attachments, importance, send time, and receive time.</li> <li>• Allows you to work with one folder or a series of folders.</li> </ul>	√			√
<b>Duplicate Email Eliminator across Folders</b> <ul style="list-style-type: none"> <li>• Includes all the functionality of the Duplicate Email Eliminator.</li> <li>• Also eliminates duplicate messages <i>across</i> multiple folders. For example, if a message appears in both Folder A and Folder C, one of the duplicates will be deleted.</li> </ul>	√			√

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<b>Outlook Add-Ins and Primary Features, cont.</b>	<b>Efficiency</b>	<b>Security</b>	<b>Confidentiality</b>	<b>Server Space</b>
<p><b>Follow-Up Reminder</b></p> <ul style="list-style-type: none"> <li>• Automatically notifies you of people who have not responded to your email messages—useful both internally and for departments like sales.</li> <li>• Lets you see all pending reminders with the click of a toolbar button.</li> <li>• Allows you to put the reminder in snooze mode, dismiss it, or view the related email.</li> <li>• Allows you to remove cc'd recipients from the reminder list.</li> </ul>	√			
<p><b>Quick Text Hotkeys</b></p> <ul style="list-style-type: none"> <li>• Lets you map often-used words and phrases to function or keyboard keys. When pressed, the key inserts the text into the email.</li> <li>• Stores an unlimited number of text entries.</li> <li>• Includes a toolbar button that displays your quick text entries, for easy recall.</li> </ul>	√			
<p><b>Reply-to-All Monitor</b></p> <ul style="list-style-type: none"> <li>• Prompts you before you send a “Reply-to-All” email, giving you the chance to think twice before revealing confidential information to a large group.</li> <li>• Prompts you if you click “Reply” and there are others cc'd on the email, giving you a chance to remove the cc'd individuals if appropriate.</li> <li>• Prompts you before you reply to an email on which you were bcc'd, preventing you from inadvertently revealing the fact that you received the message.</li> <li>• Prevents Outlook from including your name and email address when you click “Reply to All,” saving you the hassle of deleting the unnecessary email.</li> </ul>	√	√	√	√

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<b>Outlook Add-Ins and Primary Features, cont.</b>	<b>Efficiency</b>	<b>Security</b>	<b>Confidentiality</b>	<b>Server Space</b>
<p><b>Safeguard Send</b></p> <ul style="list-style-type: none"> <li>• Prompts you with a customizable message when you try to:               <ul style="list-style-type: none"> <li>○ Send an email outside your company’s domains.</li> <li>○ Send an email to a specific email address or domain.</li> <li>○ Send an email that contains certain customizable keywords.</li> <li>○ Send an email that has more than a certain number of recipients; the number is customizable.</li> <li>○ Send an email that has a blank subject.</li> </ul> </li> <li>• Allows you to choose which of these features you would like to implement, so you can fine-tune your requirements for security and confidentiality.</li> </ul>	√	√	√	√
<p><b>Schedule Recurring Email</b></p> <ul style="list-style-type: none"> <li>• Sends out regular emails at daily, weekly, monthly, or yearly intervals.</li> <li>• Addresses the email to one person or multiple people.</li> <li>• Allows you to specify a file or an entire folder that should always be sent with the email; the software pulls the most up-to-date file or folder at the moment it sends the email.</li> <li>• Includes the ability to instantly view a list of pending emails.</li> </ul>	√			
<p><b>Sent Items Organizer</b></p> <ul style="list-style-type: none"> <li>• Organizes your sent emails by keeping related messages together.</li> <li>• Sorts sent items into Outlook folders based on email addresses and/or customizable keywords.</li> <li>• Automatically saves sent items to the correct Outlook folder, or if you prefer, prompts you to choose which folder is correct.</li> <li>• Quickly organizes all existing sent items, not just future emails.</li> </ul>	√			

<b>Outlook Add-Ins and Primary Features, cont.</b>	<b>Efficiency</b>	<b>Security</b>	<b>Confidentiality</b>	<b>Server Space</b>
<b>VCard Converter</b> <ul style="list-style-type: none"> <li>• Converts all your contacts to VCard format with one mouse click.</li> <li>• Exports selected contacts only or all contacts in a folder.</li> <li>• Imports multiple contacts from a single vcf file.</li> <li>• Exports multiple contacts to a single vcf file or individual vcf files.</li> </ul>	√			

## *Setting the Bar for the Industry*

- **Quality Software:** Sperry Software produces professional products for mid-size to large organizations. Its software has been designed to meet precise standards as part of the company’s participation in the Microsoft Certified Partner program.
- **Established Client Base:** Sperry Software has served thousands of satisfied clients, including Fortune 500 companies like General Electric, Cisco, Merck & Co., and Microsoft. It has recently sold more than 40,000 licenses to Barclays Bank (of England), and upwards of 150,000 licenses to Verizon Wireless and Verizon Telecom combined.
- **Personal Assistance:** One of Sperry’s representatives will personally assist your system administrator in installing the software. That representative can also help you determine how to customize each Outlook add-in for optimal effectiveness.
- **Complete Support:** Sperry Software provides the best level of support in the industry. All clients receive full and free support, which includes live remote assistance, instant messaging, email, and phone. Live remote assistance is especially helpful, as it allows Sperry representatives to link to your screen and thereby troubleshoot problems more quickly.
- **Free Calls:** Sperry offers a toll-free number for all customers, regardless of whether your call is related to sales or support. This number is posted prominently on every page of the Sperry Software Web site.
- **Helpful Resources:** Also on the Web site, you will find a page called “Troubleshooting Tips.” This is another tool you may find helpful, in addition to the complete support that is provided.

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- **Secure Ownership:** Sperry Software is an established corporation that owns all of its Outlook add-ins, and is constantly developing more. Sperry makes sure its products work together seamlessly, and it will be there years down the road when you need additional products and support.
- **Financial Promise:** Sperry Software offers a money-back guarantee on all its products.

To discuss your organization's needs and find out how Sperry Software can help, please call 1-800-878-1645 or email [info@sperrysoftware.com](mailto:info@sperrysoftware.com).

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