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How to Establish an Email Archiving Plan

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## How to Establish an Email Archiving Plan

April 17, 2013 | [Email and Collaboration](#)



In order to comply with internal and local, state and national compliance regulations, you need [email archiving](#) so that you can save important email correspondence and files, and quickly retrieve this information. In the previous article in this series, savvisdirect told you about the importance of email archiving. This post reviews the steps that you need to take to create an email archiving plan.

### Creating Your Plan of Action

Before you institute email archiving for your company, you must put together a plan. Here are some items to think about:

1. Identify Regulatory Requirements: You need to know what regulatory requirements are necessary for your company, including local, state and federal regulations.
2. Identify eDiscovery Scenarios: After archiving your emails, you may get requests to quickly find and retrieve records from both inside and outside of your organization. Figure out the type of data that is most likely to be requested. This will influence the solution that you choose and the procedures for retrieving emails.

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3. Establish a Retention Policy: You need to figure out how long you want your emails archived. This will depend on your company, industry and regulations. Recommendations include anywhere from three years for educational organizations to as long as five years for corporations. Having a policy in place also protects you if your need to go to court. Courts look at your policy and to see if in “good faith” you followed the email archiving and deletion process laid out in it.

4. Involve all Stakeholders: You need buy-in from all the major stakeholders in your organization, including HR, legal, finance, compliance, IT and investor relations. Email archiving affects everyone in the company so you need to know what [email program](#) they use, where emails are stored, and how/how often old emails are accessed.

5. Change Management for Employees: Employees need to know and understand the new policy for archiving emails, and you must provide training on how to use the new tools and technologies. You may want to refresh this training on a regular basis to ensure that everyone is following it.

6. Avoid PST Files: If you are using Microsoft Outlook or Exchange, then you more than likely have PST files on employees’ local machines. PST files allow employees to store and access older emails. To minimize legal risk, you need to convert these files to read-only files.

7. Finding an [Email Archiving Solution](#): Shop around for the best solution based on your needed requirements. Look for a solution that is automated so that you don’t have to remind employees to constantly archive their emails.

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