



Email labeling protocols
March 2015

**Our clients are busy. Really busy.
Some get hundreds of emails per day.**

**Just the time spent opening and
closing emails takes a block of time.**

**Not reading the emails. Not
responding. Just opening and closing.**

**Let's look at some emails I sent a
client:**

<p>████████ Sarah'</p> <p>RE: Specialty</p> <p>Absolutely. Patrick Lamb Valorem Law Group T</p>	Tue 1/13
<p>████████ Sarah</p> <p>Re: Specialty</p> <p>No. We deferred appointment of the arbitrators until</p>	Tue 1/13
<p>Sarah ██████████</p> <p>Harvey v. ██████████ : INFORMATION FROM PLAINTIFF'S L...</p> <p>Sarah— I received a call from Ted Tanenbaum,</p>	1/9/2015
<p>Sarah ██████████</p> <p>Naturalock v. ██████████ : NEW COUNSEL FOR NATURAL...</p> <p>I have been advised that Hall Estill</p>	1/9/2015
<p>████████ Sarah'</p> <p>RE: Satterwhite: ██████████ v. Specialty arbitration: ARBIT...</p> <p>Our top three. Patrick Lamb Valorem Law Group T</p>	1/9/2015
<p>████████ Sarah'</p> <p>RE: Satterwhite: ██████████ v. Specialty arbitration: ARBIT...</p> <p>The amount each person charges Candidates Hourl</p>	1/9/2015

If Sarah [Client] has her email file structured to see this much information.....

....what does she know about any email before she opens it and reads it?

Does she know its importance? Whether it requires action by her? The urgency?

The answer, unfortunately, is **no.**
My emails are part of our client's time problem.

**But what if my emails more effectively
communicated critical information?**

Sarah [REDACTED]

Harvey v

12/17/2014

Sarah— I was struck by the fact that the plaintiff's

vs.

Nicole Auerbach

Naturalock: TIME SENSITIVE-SIGN-OFF REQUIRED

3:48 PM

Deadline 1/23/2015 4 pm. Sarah— Attached is a

**This communicates
nothing of value to our
client**

**This communicates two things—
urgency and action required.**

**Better use of real estate. Matter name referenced but
not client name—client knows their name.**

Second Problem: We can be verbose!

Solution: **BLUF (Bottom Line Up Front)**

Consider the first paragraph an executive summary. Any details and can follow. This way, if the client does not want details, they can stop reading or they read later. We don't force them to wade through a long email to get to a point they may not care about.

Valorem convention for emails:

[Matter Name]—[Level of Urgency]—[Action Requested]

Level of Urgency:

Immediate Action Required

Time Sensitive

Not Urgent

Informational

Action Requested:

Approval

Signature Required

Information needed

No action required

(others as appropriate)

**Think about the email you are
sending from the **Client's**
perspective, not your's.**

For intra-office mail.....

Re: [Short name of Case] –[Degree of Urgency]—[Deadline for response]

Example: Re: RentPayment—Urgent—2/4 COB

For non-case specific intra-office mail...

Re: Not Case Specific—[Degree of Urgency] –Response required

Example: Re: Not Case Specific—Informational—No response required

A great suggestion.....

With all emails, I think outside counsel can improve communications simply by being more concise and having relevant information up front. And forwarding along updates/orders without telling me what is in the attachment is a pet peeve. We frequently are checking email by phone, so we cannot easily read attachments.

Sarah [Client]

Implementation and Quality Control



These requirements for emails are to be implemented **immediately**.

We are going to look for examples of people who take this step to make our clients' lives better. And we are going to celebrate those examples.